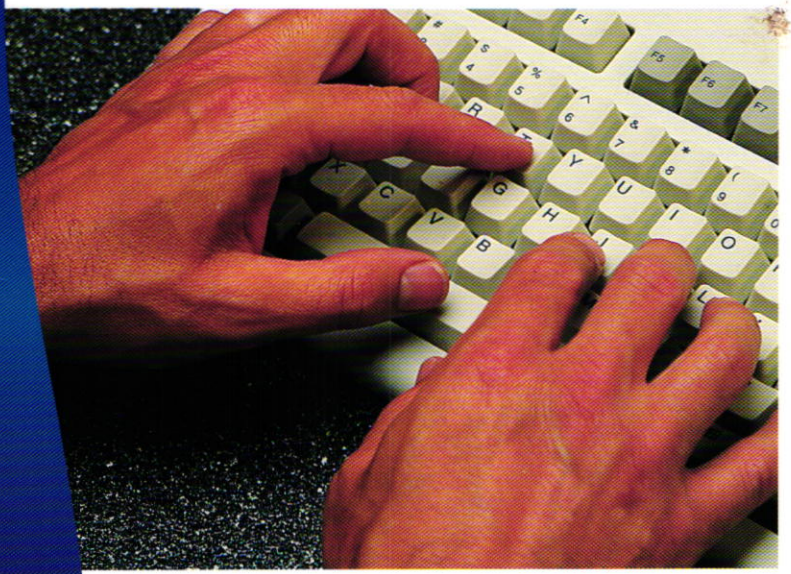
Franklin®

TrueSync™ INFORMATION MANAGER

FOR REX™



USER'S GUIDE

Starfish

Device, desktop and synchronization software developed by Starfish

Starfish

User's Guide

TrueSync Information Manager for REX™ Card

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Introduction

Introducing REX

Congratulations on your purchase of REX! The REX card represents the next generation in ultra-portable technology that keeps all the latest information in your shirt pocket so you'll always be on time and on track.

REX is a complete personal information management system that includes the credit-card sized REX card and the TrueSync Information Manager, which includes the TrueSync Synchronization software. An optional REX docking station is available for connecting the REX card to a PC that does not have a PCMCIA card slot.

The REX card is small enough to fit in your pocket and yet lets you view thousands of appointments, addresses, To Do items, and memos. TrueSync Information Manager is a full-featured PC organizer with an important extra: the TrueSync synchronization software. Using the TrueSync synchronization software, you can transfer files from TrueSync Information Manager to your REX card.

About TrueSync Information Manager

TrueSync Information Manager is a personal information management program designed specifically to synchronize files to the REX card using the built-in TrueSync synchronization software. It runs on your Windows 95 or N.T. 4.0 laptop or desktop computer.

Using TrueSync Information Manager, you can:

- Manage your calls, meetings, and To Do items in the Calendar view, and see your schedule by day, week, or month.
- Store thousands of names, addresses, phone numbers, notes, and other contact information in the Contacts view.
- Track the time in multiple time zones and prepare your REX card for appointments in more than 500 cities around the world in the EarthTime view.
- Create letters, speaking notes, driving directions, and other information in the Memos view.

- Print cards, calendars, and other information in a variety of formats.
- Select and synchronize your information to the REX card using TrueSync synchronization software.

New and improved

There have been many improvements in importing data, including support for new versions of several popular organizers.

New support for:

- Outlook 98
- ACT! Calendars
- Schedule+ 7.5 Calendars and Contacts
- Organizer 97GS Calendars and Contacts

Improved support for:

- Outlook 97
- Organizer 97/97GS import
- Schedule+ 7.0/7.0a/7.5 import
- Larger Contact and Calendar files supported
- EarthTime

There are several changes to the User Interface.

- The TrueSync icon on the Toolbar is no longer available. Instead, click the TrueSync icon on the Deskpad or on the Windows system tray.

- There is now a progress bar indicator to illustrate import progress. It displays how many records are being imported and the current record being processed. This is especially useful when importing large files.

- There is a new Troubleshooter Guide available from the Windows Start menu or the TrueSync Information Manager Help menu. This HTML-based guide helps quickly diagnose and fix common problems.

- A new sub-directory called "TrueSync" is created under the TrueSync Information Manager directory. It will store any new TrueSync import filters and other TrueSync Plus for REX information that may be used if you update to TrueSync Plus for REX in the future.

- PCMCIA support is improved. The installation automatically detects and corrects certain problems with third-party drivers. It

specifically fixes a conflict between "Card Wizard" and Windows Plug-n-Play drivers.

Using REX with other organizers

TrueSync Information Manager has extensive import capabilities, so you can start using REX quickly if your information is in another PC organizer or file format. For example, you can import files from popular organizer programs such as Microsoft Outlook 97/98, Schedule+ 7.0/7.0a/7.5, Lotus Organizer 97/97GS, and ACT! 3.0.6/3.0.7/3.0.8 into TrueSync Information Manager. Then you can synchronize those files to your REX card.

In addition, TrueSync Plus for REX will let you synchronize files to your REX card directly from Outlook 97/98, Schedule+ 7.0/7.0a/7.5, Organizer 97/97GS, and ACT! 3.0.6/3.0.7/3.0.8 without importing them into TrueSync Information Manager. To learn more about or order TrueSync Plus for REX, call Starfish at 888-STARFISH (888-782-7347), or visit their Web site at www.starfish.com.

NOTE Users of Starfish Sidekick 98 can synchronize directly to the REX card without TrueSync Plus for REX.

About the REX documentation

This *User's Guide* explains everything you need to know about using TrueSync Information Manager for the REX card, as well as the TrueSync synchronization software. The *Troubleshooter Guide* helps you quickly diagnose and fix common problems. To view the *Troubleshooter Guide*, click Start and choose Programs | REX TrueSync | FAQ & Tips. The *REX User's Guide* provides detailed information about using the REX card itself. The *REX Docking Station User's Guide* shows you how to connect and use the docking station.

This *User's Guide* and the online Help system are designed to make information about TrueSync Information Manager easy to find.

To help you understand what you see, here are some conventions used in this user's guide:

- Multilevel menu selections are separated with a vertical bar (|). So, where you see **File | Save**, it is a shorthand way of saying "Open the File menu, and then select the Save command in that menu." The menu choices always appear in the order you see them: Menu name first, then menu choice, then next menu choice, if there is one, such as Calendar | Events | Single Day.

- When you need to type some information, it's indicated in a different typeface: like this.
- Keys to press are indicated with a different typeface, like this: *F10.*
- Pressing two keys in combination is indicated with a plus sign (+), for example, *Ctrl+D.* Press and hold down the first key (*Ctrl*), and then press the second key (*D*).

Windows basics

This user's guide assumes that you have a basic understanding of Windows fundamentals—using the mouse or keyboard, working with windows, and so on. If you're new to the Windows 95 environment, see your Windows 95 manual, or take a few minutes to run the Windows 95 Tour from the Start menu. Click Start, Programs, Accessories, Tips and Tour on most Windows 95 installations, or click Help in the Start menu.

Using online help

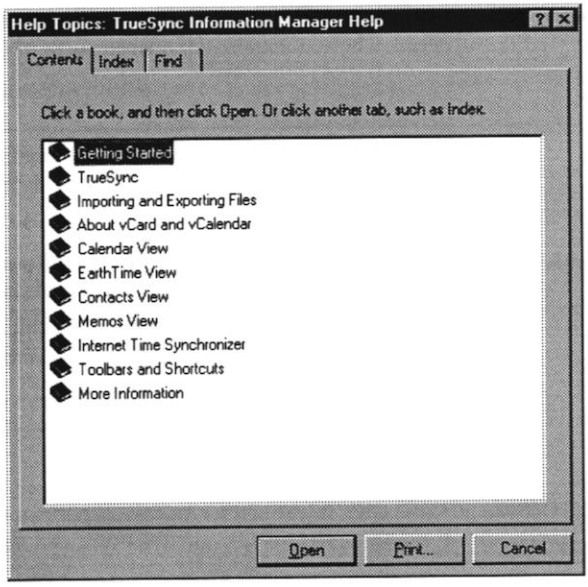
TrueSync Information Manager has a detailed online help system. Help appears in a separate window with its own controls.

Major features of TrueSync Information Manager, such as the views, are discussed in a series of overview topics. Help topics that explain how to accomplish a task are in windows that you can leave displayed while you follow the procedure.

To open Help, do one of the following:

- Press *F1*. For help on a particular menu command, select the command and press *F1*.
- Click the Help button in a dialog box, or press *F1*, for help about dialog box controls.
- Choose a command from the Help menu on the TrueSync Information Manager menu bar.

On the Help Contents page, you'll find a series of book icons:



Double-click a book to "open" it and view its contents, which may be other books or topics. Double-click an open book if you want to close it again.

Double-click a page icon to view that help topic.

ToolTips

If you pause while passing the mouse pointer over an object like an icon or Toolbar button, the name of the object is displayed. This feature, called ToolTips, makes it easy for you to identify what you see and find what you need.

TrueSync tips

In addition to online help, you will find a file of helpful hints and tips for using TrueSync Information Manager in the Memos view. In the Memos view, open the file called "Getting Started" in the Userdata folder and then select a subject to read.

For more information

There are several sources for more information about REX, including the other REX printed documentation, the Internet, and telephone technical support.

Printed documentation

Your first source is the user's guide that you are currently reading, as well as the *REX User's Guide*, which covers use of the REX card in detail. These manuals will answer most of your questions.

If you are using the docking station to connect your REX card to a personal computer, read the *REX Docking Station User's Guide* for specific information. The *REX Quick Start Guide* and the *REX Key Guide* may also have been provided with your REX card for quick reference.

The Internet

A second useful source of up-to-date information is the Internet. Visit the REX Web site at www.franklin.com/rex 24 hours a day for the latest information about REX. You can also order a docking station or more REX cards at the REX Web site.

To learn the latest about TrueSync Information Manager, TrueSync Plus for REX, Sidekick 98, and other Starfish products, visit the Starfish Web site at www.starfish.com.

Telephone technical support

And lastly, telephone technical support for the REX card, TrueSync Information Manager, and TrueSync synchronization software is available to you between 6 a.m. and 5 p.m. Pacific (U.S.) time. To speak with a technical support specialist, call 1-888-REX-6400. If you're calling outside the U.S., call 1-609-386-2500. The Starfish Web site at www.starfish.com provides even more details for getting technical support by phone.

NOTE Some of the screen illustrations in this user's guide may not exactly match what you see on your computer screen. This does not necessarily mean that TrueSync Information Manager, TrueSync synchronization software, or your REX card is malfunctioning.

1

Installation

Before you install the TrueSync Information Manager software on your computer, read the requirements section below to make sure that you have the necessary hardware and software. Some features may require special configuring.

This chapter discusses:

- What you need to take full advantage of TrueSync Information Manager's features
- How to install TrueSync Information Manager

Requirements

To use TrueSync Information Manager, you need:

- A computer running Windows 95 or Windows NT 4.0
- A minimum of 10 MB hard disk space for installation (including 1 MB of temporary space on the same drive as your Windows directory for installation)
- 256-color VGA video and monitor
- A 3.5" high density disk drive or a CD-ROM drive.
- A mouse compatible with Windows 95 or Windows NT 4.0
- A sound card is required to play sounds (.WAV files) for appointment alarms.
- You should have a printer supported by Windows 95 or Windows NT 4.0.

In order to synchronize information to your REX card, you must have either an available serial communications (COM) port and the REX Docking Station or a Type II PC Card (PCMCIA) slot. The REX device was designed to use the standard Windows 95 PCMCIA

drivers, which recognize the REX device as Plug and Play. If your computer is using another, third-party driver and isn't recognizing your REX card, consult the Starfish Web site for technical support (www.starfish.com).

Windows NT

If you are using a computer running the Windows NT 4.0 operating system, you must use the REX Docking Station to connect the REX PC Companion to your computer. The REX Docking Station lets you connect the REX PC Companion to one of the serial communication (COM) ports on your computer.

The REX Docking Station is available from Franklin Electronic Publishers. You can order it directly on-line by selecting the Order option on the REX Web site.

The Windows NT 4.0 operating system does not recognize PCMCIA devices in the same way that the Windows 95 operating system does. The REX PC Companion cannot be used in the PCMCIA slot of a computer running Windows NT 4.0.

If you have other questions about the REX PC Companion or the REX Docking Station, call technical support at 1-888-REX-6400 between 8 a.m. and 8 p.m., Eastern time.

Registering TrueSync Information Manager

Before you install, take a moment to read the Software License, Disclaimer of Warranties, and Limitation of Liability printed on the reverse side of the title page of this manual.

Be sure to register your copy of TrueSync Information Manager so that you can receive product information and support.

Installing from diskettes

To install TrueSync Information Manager from diskettes or CD-ROM, use the instructions in this section.

TIP

As an alternative, you can select Run from the Windows Start menu and then enter the drive letter (e.g., A, B, C) followed by:\ SETUP.EXE. For example, if your floppy drive is drive A, you would enter a:\SETUP.EXE.

To Install TrueSync Information Manager

1 Insert the TrueSync Information Manager diskette 1 in your 3.5" floppy disk drive or the TrueSync Information Manager CD-ROM in your CD-ROM drive.

NOTE If you insert the TrueSync Information Manager CD-ROM into your CD-ROM drive, the installation program should launch automatically. If this occurs, ignore the following steps and follow the on-screen instructions.

2 Click Start on the Windows Taskbar and then choose Settings | Control Panel.

3 Double-click Add/Remove Programs.

4 Click the Install button.

5 At the "Install Program From Floppy Disk or CD ROM" screen, click the Next button.

6 If necessary, use the Browse button to locate the program SETUP.EXE, which should be on the diskette or CD-ROM.

7 To begin the installation, click the Finish button, or click SETUP.EXE and then click the Open button.

NOTE You can open Sidekick 97, Internet Sidekick, and Sidekick 95 files from within TrueSync Information Manager. If you have Sidekick 98 installed, you will be asked during the installation process if you want Sidekick 98 to serve as your primary organizer. By accepting this option, you can use Sidekick 98 with the REX card.

The Readme file

If there are last-minute changes or additions to TrueSync Information Manager, they are documented in a Readme file. When the installation program has finished installing the TrueSync Information Manager, the Readme file appears. To view it later, click the Windows Start button, and then choose Programs | REX TrueSync | Readme).

Uninstalling TrueSync Information Manager

If you decide to remove TrueSync Information Manager from your computer, use the uninstall program.

The uninstall program permanently removes all TrueSync Information Manager program files and TrueSync Information Manager entries in the Windows Registry. If you have information

files in the TrueSync Information Manager folder, it does not remove them. You can preserve them or remove them manually from your data folder (usually Program Files\Starfish\REX TrueSync\Userdata), and then delete the folders if desired.

To permanently remove TrueSync Information Manager from your computer

1. Click Start on the Windows Taskbar. Choose Settings | Control Panel.
2. Double-click Add/Remove Programs.
3. Choose TrueSync Information Manager from the listed applications.
4. Click the Add/Remove button.
5. Click the Yes button.

2

Overview

This chapter provides an overview of the many features of TrueSync Information Manager that can help you organize and simplify your busy schedule.

The topics discussed in this chapter include

- Starting the TrueSync Information Manager
- The Deskpad, icons, and Toolbars
- The major "views" of TrueSync Information Manager
- TrueSync Information Manager shortcuts and preferences

Starting TrueSync Information Manager

Before using TrueSync Information Manager, you must complete the installation process described in Chapter 1.

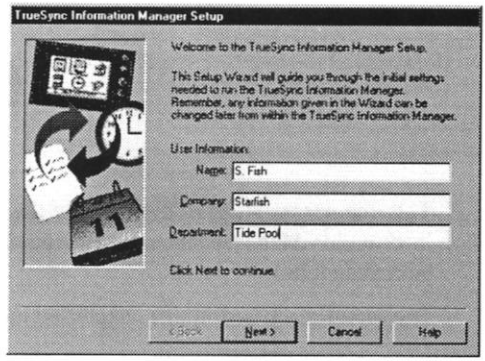
To start the TrueSync Information Manager

In the Windows Taskbar, click the Start button and choose Programs | REX TrueSync | REX TrueSync Information Manager.

First-time startup

The first time you start TrueSync Information Manager, the Setup Wizard helps you provide information about your location and your computer system.

The Setup Wizard panels are self-explanatory. If you need assistance, click the Help button in any Wizard panel. You can run the Setup Wizard later, if necessary, by selecting it from the Tools menu.

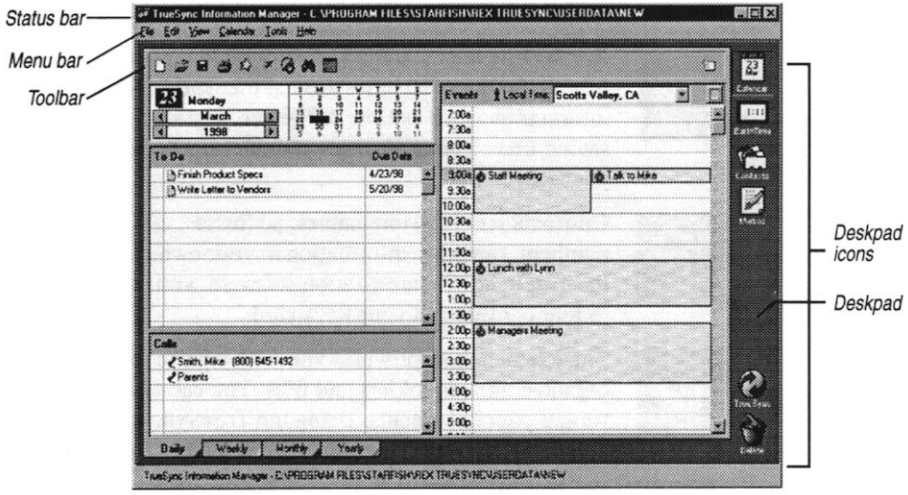


Fill in the information in each panel of the Setup Wizard and click the Next button to continue. You can click the Back button if you need to change the information in an earlier panel.

If you need to change this information, start TrueSync Information Manager and choose Tools | Setup | Wizard.

The TrueSync Information Manager screen

The major components of TrueSync Information Manager are displayed in the following illustration, which shows the Calendar view and identifies the features common to most views.



The **Toolbar** buttons let you do certain tasks quickly, without using the menus. The Toolbar and Menu bar change with each view. See "The Toolbar" on page 14 for more information.

The **Status bar** displays information about the current view. For example, if you are in the Calendar view, the status bar displays the name of the current Calendar file.

The working area of the TrueSync Information Manager screen is called the **Deskpad**. To make changes to the default Deskpad colors and other display options, choose Tools | Preferences | General. See "Setting preferences" on page 17 for more information.

Icons and views

Click a Deskpad icon to change to a different view in TrueSync Information Manager. The views—and how to use them—are described in detail in later chapters of this User's Guide. Since you'll probably be moving back and forth among different views, here's a helpful command you should know: save your work in all views at once by choosing File | Save All.

In the **Calendar**, you can create appointments (events) and keep track of all your To Do items and calls. If you travel with your computer,

your appointments adjust to the local time zone when you switch to a new local time. You can print your calendar in a variety of formats, including page sizes suited to the most popular day planners, such as At-A-Glance, Day Runner, Day-Timer, and Franklin Planner. Using the TrueSync synchronization software, you can transfer your calendar events to your REX card and view them wherever you go.

EarthTime tells you the current time in eight cities that you select from more than 500 cities around the world and provides other information, such as time difference, and start and end of daylight saving time. The eight cities and their times can be synchronized to your REX card.

Contacts lets you store names, addresses, e-mail addresses, phone numbers, and other information in your own personal cardfiles. Using the TrueSync synchronization software, you can transfer and view up to four cardfiles on your REX card.

The **Memos** view provides you with a place to create memos and organize them in folders and files. You can also change fonts and format your documents. Using the TrueSync synchronization software, you can then transfer your memos to your REX card.

The **TrueSync** icon lets you synchronize immediately with your REX card. Simply click on the icon to bring up the TrueSync Synchronization dialog. Then click the Synchronize button.

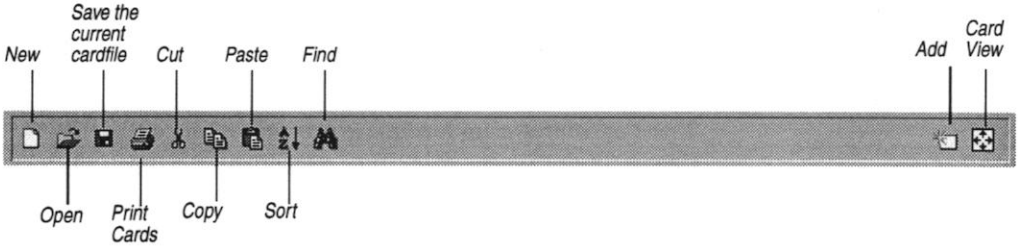
The **Delete** icon lets you delete items from TrueSync Information Manager. To delete a card, memo, or calendar activity, simply drag it to the Delete icon on the Deskpad.

The Toolbar

Most views in TrueSync Information Manager have a Toolbar, which makes it quick and easy to perform standard actions in that view.

Point to a button with the mouse and pause to see a ToolTip identifying the button.

The Contacts Toolbar is shown here.



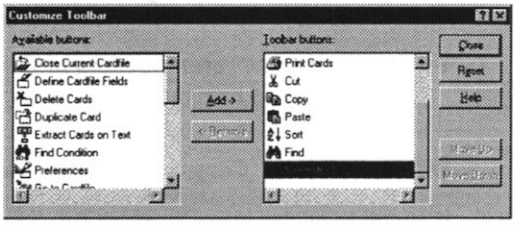
Customizing the Toolbar

You can customize the Toolbar for each view, except EarthTime, to display the buttons that you want. You can add, move, or remove any of the available buttons from the Toolbar.

To customize the buttons on the Toolbar, from within the desired view choose Tools | Setup | Toolbar or double-click any open space on the Toolbar. The following dialog box appears:

To add a button

1 *Click the button you want to add in the Available Buttons list.*
2. *Click the Toolbar Button you want to add it before.*
3 *Click Add.*



To remove a button

1 *Click the button you want to remove in the Toolbar Buttons list.*
2 *Click the Remove button.*

From within the Customize Toolbar window, highlight the button you want to move, and click the Move Up or Move Down buttons to move the button to the desired location. The Move Up button moves the button to the left and the Move Down button moves the button to the right.

- To return the Toolbar to its original view, click the Reset button.
- Any changes affect only the Toolbar for the view that you are currently viewing. To make changes to a different Toolbar, select the desired view and make your desired changes.
- The buttons on the right side of the Toolbar cannot be moved or removed from the Toolbar.

Using the Internet Time Synchronizer

The Internet Time Synchronizer lets you set your computer's system time using an Internet time server. (You must first have Internet access to use this feature.)

To set up your system for time synchronization
Choose Tools | Synchronize | Time Synchronizer Setup in any view.

The Time Synchronization dialog box appears. Use it to select a time server and specify a schedule for synchronizing, if desired. (For more information, click the Help button in the dialog box.)

To synchronize your system with an Internet time server
Choose Tools | Synchronize | Synchronize Time Now, or open the Time Synchronization dialog box and click the Synchronize Now button. The dialog box shows the results of the latest time synchronization in the bottom panel.

Shortcuts

TrueSync Information Manager has other features, discussed in this section, that simplify the work you can do with your computer:

- **Shortcut menus**. Perform actions in TrueSync Information Manager quickly by right-clicking and selecting a menu item from the shortcut menu.
- **Drag and drop**. Copy or move items using your mouse.

Shortcut menus

If you right-click certain TrueSync Information Manager objects, such as a card or activity entry, a context-sensitive shortcut menu appears. These menus provide basic commands such as Cut, Copy, Paste, or other commands specific to that object or view.

NOTE When you are moving events to a different type of list, only the text description is retained. For example, the time and duration of an event are lost if the event is moved to the To Do list; similarly, To Do attributes cannot be moved with an item to the Events pane.

Drag and drop

Drag and drop is one of the easiest ways to move and copy entries from one area of the program to another. Several of the objects on the Deskpad are drag and drop "targets." For example, you can drag an entry you want to delete to the Delete icon.

To drag and drop a card or document

Point to it, hold down the left mouse button, and drag the pointer to the place you want to drop the object. Release the mouse button. In the Contacts view, point to the index line in the Card list; in Memos, point to the subject line in the Memos list; in the Calendar, point to an icon of an event. Many of these items can be selected as a group, as described in later chapters.

In the Contacts view

In the Contacts view, you can use drag and drop to

- Drag a card to the Delete icon to delete it.
- Drag cards to cardfile tabs to move them from one open cardfile to another. (After you start dragging the card, hold down the *Ctrl* key if you want to copy the card instead of moving it.)
- Drag a URL (Web address) from a cardfile to your open browser's address window.

In the Calendar view

In the Calendar view, you can use drag and drop to

- Drag an event to the Delete icon to delete the item, or
- Drag an event from one time slot to another in the Calendar Daily view.

In the Memos view

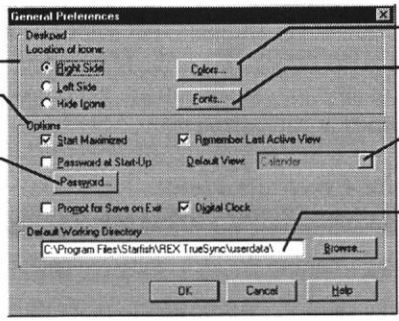
In the Memos view, you can use drag and drop to

- Drag a memo to the Delete icon to delete it, or
- Drag a memo to a folder tab to move the document to a different folder. (Hold down the *Ctrl* key as you drag to copy a memo rather than moving it.)

Setting preferences

You can customize the TrueSync Information Manager by setting its preferences. Choose Tools | General Preferences in the EarthTime and Contacts view and Tools | Preferences | General in the Memos and

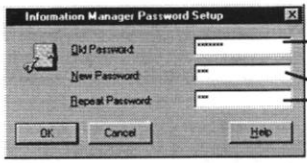
Calendar views for overall TrueSync Information Manager preferences.



The individual views have their own Preferences menus, discussed in later chapters.

Using password protection

You can set a password so that only someone with the password can open TrueSync Information Manager. Check Password at Startup in the General Preferences dialog box (described in the preceding section). The Password Setup dialog box appears.



Always record your password and keep it in a separate location. Once you create a password, it is required to run TrueSync Information Manager.

NOTE The REX card has a password of its own. The password for the REX card is not affected by the password for the TrueSync Information Manager.

Transferring information from other organizers

TrueSync Information Manager can read cardfile and calendar information from other products such as Microsoft Outlook 97/98, Schedule+ 7.0/7.0a/7.5, ACT! 3.0.6/3.07/3.08, and Organizer 97/97GS, as well as Sidekick 97/98.

For details, see the Memo file "Getting Started." There you will find a memo called "Import/Export" which explains the process. You will also find other helpful information in this file. If this file is not already

displayed when you switch to the Memos view, use the File | Open Memo File command to open it. The file is stored in your default data directory, usually called Userdata.

You can open files from Sidekick for Windows 2.0 as well; however, when you open Sidekick 2.0 files with TrueSync Information Manager the files are permanently reformatted. Therefore, it is advisable to back up your Sidekick files before opening them. In the Calendar, Contacts, and Memos views, use File | Open to locate and open the files you want. When you save the files, they are saved in TrueSync Information Manager format.

3

The Calendar view

The TrueSync Information Manager Calendar view is a powerful tool for helping you organize your events and activities. You can use the Calendar to schedule events, set reminders, and maintain a list of To Do items and phone calls.

Once you have updated your Calendar files, you can use the TrueSync synchronization software to transfer the latest information to your REX card. On your REX card, events appear in the Calendar, and To Do items and Calls appear on the To Do lists.

To switch to the Calendar view, click the Calendar icon on the Deskpad, press *F6*, or choose View | Calendar.

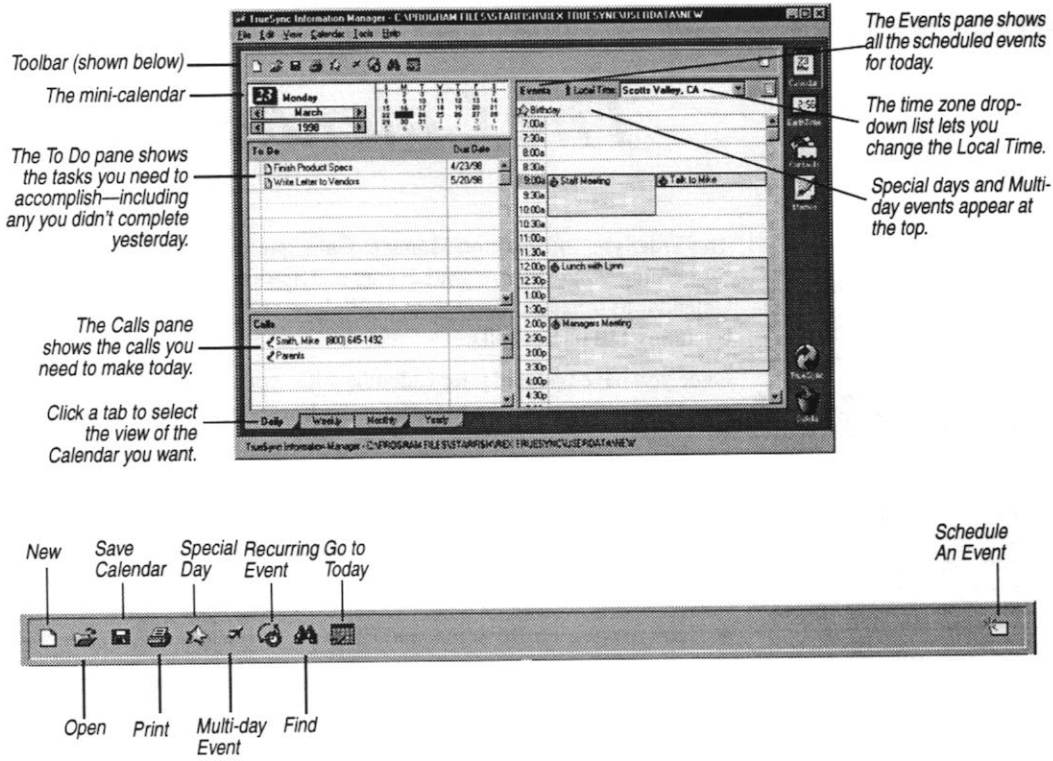
This chapter explains how to

- Enter events, To Do items, and Calls
- Schedule special days, recurring events, and multi-day events
- Search for specific entries
- Enter time zone information for events
- Set Calendar preferences and customize Calendar views

TIP

Be sure that you set the Local Time so that the Calendar view displays your events based on the correct time zone. You can set the Local Time from either the time zone drop-down list in the Daily view of the Calendar or from the EarthTime view.

The following figure illustrates the Calendar view.



Viewing your Calendar

You can view your personal calendar in four formats, including Daily, Weekly, Monthly, and Yearly views (discussed here and on page 34).

TIP

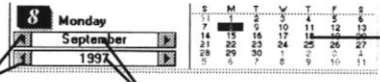
You can quickly jump to today's calendar from another date, or from Weekly, Monthly or Yearly views, by pressing Ctrl+G or by selecting Go To | Today from the Edit menu.

To jump directly to today's calendar

Click the Calendar icon on the Deskpad. If you've changed to another day or switched to another view, clicking the Calendar icon once returns you to the Daily view, and clicking it a second time goes to today.

Selecting dates in the Daily view

In the Daily view, the selected date is highlighted in the mini-calendar. The following illustration shows how you can change the date using the mini-calendar.



Change to the previous or next month or year by clicking the left and right arrows.

Click the mouse on the month or year to see a drop-down selection list.

Click a date in the mini-calendar to go directly to that day.

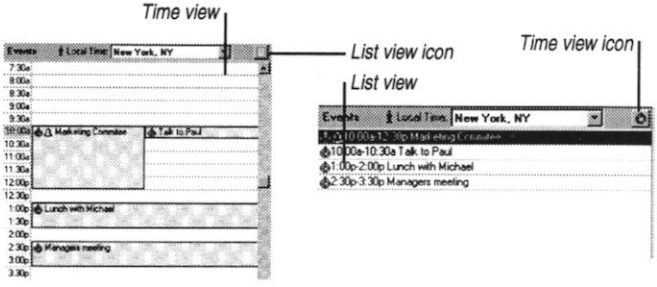
List view and Time view

You can switch between two views of your calendar's events:

Time view shows the full view of your day, with booked and empty time slots displayed.

List view shows booked time only.

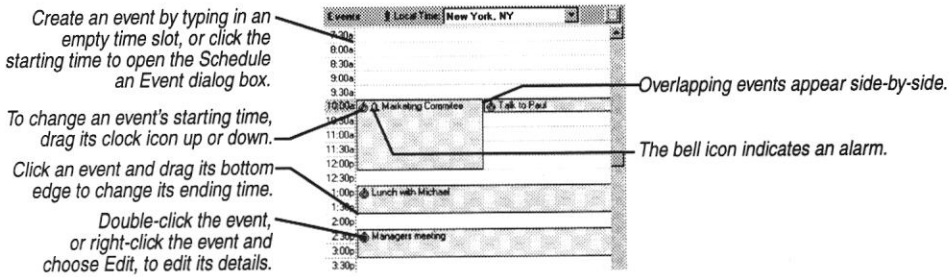
To switch between Time view and List view
Click the icon for the view.



Scheduling events

Enter your appointments and scheduled events on the Events list. You can have any number of events scheduled throughout the day, and up

to three overlapping events starting at the same fifteen minute time slot.



Creating an event in the Events pane

You can quickly create an event, without opening any dialog box, by typing in the time slot on the event day.

To create an event by typing in the time slot

Click in the Events pane on the time you want to start your event, and type a description. You can adjust the event's duration by dragging the lower edge of the event down or up to lengthen or shorten the time. When you're done typing, press *Enter.*

To create an event from a Call or To Do item

Drag a Call or To Do item (discussed later in this chapter) to the appropriate time slot in the Events pane. The Call or To Do item information is entered in the event information.

TrueSync Information Manager automatically places an event icon to the left of the event text.

Revising in the Events pane

To edit an existing event's description or time

Click anywhere in the event text to revise the description. You can change the starting time by dragging the event icon up or down in the Events pane. Change the ending time by dragging the bottom edge.

To specify time more precisely, add a detailed note, or set an alarm, use the Schedule an Event dialog box, described in the next section.

You can use drag and drop to move the event; simply drag the icon to the new time.

Using the Schedule an Event dialog box

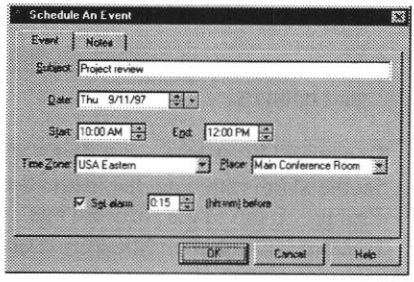
There are numerous details of an event that you can set or modify using the Schedule an Event dialog box.

To create or revise an event using the Schedule an Event dialog box, do any of the following:

- Choose Calendar | Events | Single Day.
- Click the Add button in the toolbar.
- Double-click the Clock icon for an existing personal event.
- Click a starting time.
- Double-click the selected slot.

The Schedule an Event dialog box contains two tabs (pages) that provide all the details of your event. Fill in the information you need, as shown in the following illustrations, and click OK when you are done.

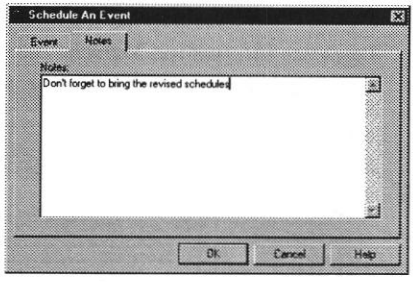
The Event Page



When you finish with each panel, click the next tab if you need to add a detailed note

1. *Type the subject.*
2. *Select the date by typing or using the arrows. The large arrow drops down a calendar.*
3. *Type or use the arrows to select the start and end times.*
4. *Select the time zone.*
5. *Click "Set alarm" to let you know ahead of time when the event will take place.*

The Notes Page



Type a message or notes for the event.

Reminder Alarms

If you want an alarm to sound on your computer or your REX card in advance of the event, check the Remind me box and then specify the

amount of time before the event. TrueSync Information Manager checks for alarms every hour, quarter hour, half hour, and 3/4 hour. The time you set is in addition to that alert time. If you set a lead time, the alarm will display that much sooner than the alarm check.

For example, if you set an alarm for 1:10, and have set a five-minute lead time, the alarm will display at 12:55. Set the lead time to increase the warning time for an alarm.

To set an alarm

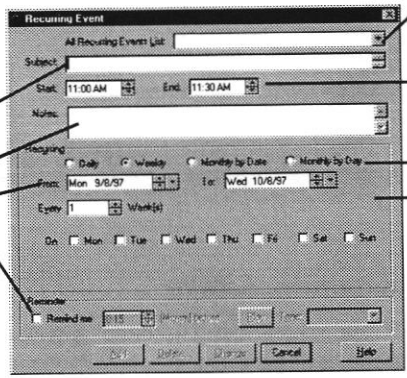
1. Choose Calendar | Event | Single Day, or click the time column of the Calendar. The Schedule An Event dialog box is displayed.
2. Type a subject in the Events page.
3. Adjust the Start and End time, if needed.
4. Check Set alarm.
5. Type or set a lead time for the alarm alert. The time is set in hours and minutes.

To use an alarm when you don't have a sound card

Set the alarm following the instructions above. The Alarm dialog box displays on top of the software application you are running, provided TrueSync Information Manager is open.

Creating Recurring events

You don't have to type regularly repeated events one-by-one. You can specify the intervals in the Recurring Event dialog box, and let the TrueSync Information Manager add these events automatically.



If you are modifying an existing recurring event, select it from this list before making changes.

Specify the period over which the event recurs.

Enter the subject for your recurring event.

Types notes or comments.

Enter start and end times.

Check if you want an alarm to remind you about the event, and enter information.

Click your choice here...

...and then choose the interval in this panel (see "Picking the interval for recurring events").

To add recurring events to the Calendar

1. Choose Calendar | Events | Recurring.
2. Enter the description text, notes, and other options.
3. Set the range of days, weeks, or months that the event will recur on using the From and To dates.
4. Choose the interval you want (see the following section). When you're done, click Add.

TIP

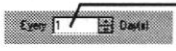
Another way to create a recurring event is to right-click an existing event or a blank event time, and choose Recurring from the shortcut menu.

Picking the interval for recurring events

You can pick one of four types of intervals for recurring events: daily, weekly, monthly by date, monthly by day, as described in the following sections.

Daily

This option lets you set an event to repeat after a day or a number of days (for example, every day or every 10 days).

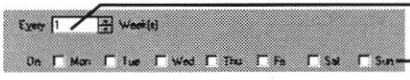


Set the number of days between occurrences. The default is 1 (daily); the limit is 366.

NOTE You can change or delete recurring events at any time, either individually from the Daily view or globally through the appropriate recurring events dialog box.

Weekly

This option lets you set an event to repeat on the same day every week, every other week, or any other weekly interval (for example, every Tuesday or every third Friday).

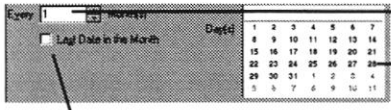


Set the number of weeks between occurrences. The default is 1; the limit is 52.

Choose the day or days of the week for the event. At least one day must be selected.

Monthly by Date

This option lets you set an event to repeat on the same date every month or every number of months (for example, the 1st and 15th of every month, or the 25th of every other month.)



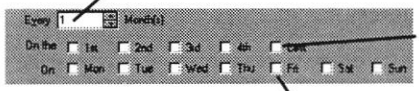
Set the number of months between occurrences. The default is 1 (every month); the limit is 12.

Select the dates for the event from the generic month grid. At least one date must be chosen.

Click if the event recurs on the last day of the month.

Monthly by Day

This option lets you set an event to repeat on the same day of the week every month or every number of months (for example, the first Tuesday of every month or the third Friday of every other month).



Set the number of months between occurrences. The default is 1 (every month); the limit is 12.

Choose the week of the month for the event. You can choose more than one week. 1st inserts the event on the first occurrence of the day, whether it's in the first full week or first partial week. Last inserts the event on the last occurrence of the selected day, whether it's in a full or partial week.

Choose the day of the week for the event. You can choose more than one day of the week, but at least one day must be selected.

Modifying and deleting recurring events

Modifying or deleting one instance of a recurring event does not affect others. You can, however, modify or delete all instances of the recurring event.

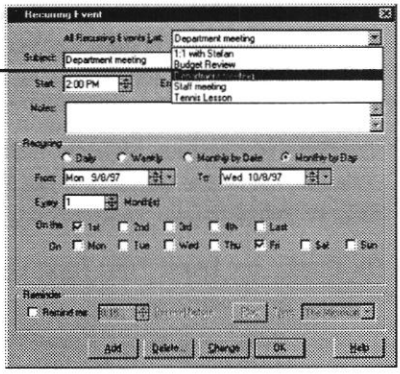
To modify or delete an existing recurring event

1 Choose Calendar | Events | Recurring.

Or right-click in the Events pane and choose Recurring from the shortcut menu.

2 In the Recurring list, click the pull-down list and select the item you want to change. (This list will be empty until you add a recurring event.)

Select the recurring activity you want to modify from the drop-down list.



3 Make changes in the schedule or text information, if you are modifying it.

4 Click Change to modify the recurring event. Or click Delete to delete it; you will see a dialog box asking you if you want to delete all occurrences, today's and future occurrences, or today's and past occurrences.

Help for travelers: changing time zones

Each scheduled event on your calendar is entered with time zone information, which you specify in the Time Zone drop-down list (see "The Event Page" on page 25). Most of the time, this will probably be the same time as your home clock. But if you are planning a long-distance trip and will be taking your computer or your REX card, you can enter events with the time zone of your destination. TrueSync Information Manager can then adjust your events when you change time zones. Thus, as you travel, you can always check with TrueSync Information Manager to find out what's happening back home, or elsewhere, in terms of the current Local Time.

When you travel

When you travel, be sure to change the Local Time to your destination. Then all events you have scheduled there will appear in the correct Local Time. In addition, you will be able to see any events back home in "real time," adjusted for your current location.

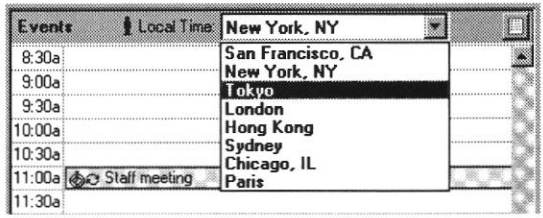
For example, when you enter the appointments for your trip to New York, you include the city (or time zone) for each one. Then, when you are in New York, change the Local Time in the EarthTime or

Calendar view to New York time. Your events adjust to display correctly in New York time, whether those events are in New York or back home in San Francisco (or elsewhere). So an event you need to attend in New York at 10 a.m. will appear at 10 a.m. on your calendar. If you need to phone in during a meeting in San Francisco that occurs at 2 p.m. (San Francisco time), it will appear on your calendar at 5 p.m. (New York time), so you know when to make the call.

TrueSync Information Manager makes sure that you always see scheduled events at the current Local Time, making it easy for you to keep on schedule.

To change the Local Time from the Calendar view

1 Click the Local Time drop-down list.

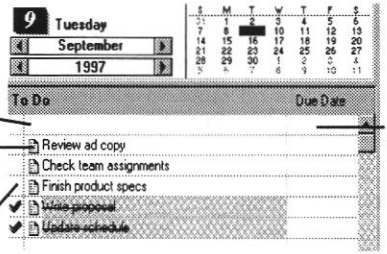


2 Select one of the eight cities.

If the desired city or time zone is not listed, then you need to change the displayed cities in the EarthTime view (see "Selecting cities" on page 82).

Entering To Do items

You can enter tasks into your To Do list, and check them off when completed. TrueSync Information Manager can forward any uncompleted tasks to the next day if you choose this option in Preferences. You can also give a To Do item a due date. See the next section for details.



Click any blank line and begin typing to create a new To Do item.

Drag the icon to move the To Do item up or down in the list.

Click here to check off To Do items when completed.

Click the right column to add or change details for a To Do item.

To create a new To Do item, do any of the following:

- You can click any blank line in the To Do pane and begin typing. When you begin typing, TrueSync Information Manager places a To Do icon in front of the text.
- Choose Calendar | To Do Items or click the right column of a blank line in the To Do pane, which opens the To Do dialog box.

Revising To Do items

To edit the text of an existing To Do item

Click in the item and edit as needed. Or right-click an item and choose Edit from the shortcut menu.

To move a To Do item

Drag and drop it to the new location.

Setting the Due Date for To Do items

You can set the due date from the To Do dialog box. By assigning a due date to a task, the To Do item turns red if not completed by that date.

Select the date by typing or using the arrows. The large arrow drops down a calendar.

Using the Calls list

If you prefer to keep your scheduled phone calls separate from your To Do list, you can enter them in the Calls list. To enter a call item, do any of the following:

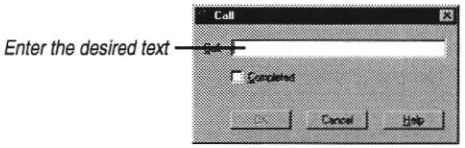
- Click any blank line in the Calls pane and begin typing. When you begin to type, TrueSync Information Manager places a call icon in front of the text.
- Choose Calendar | Calls or click the right column of a blank line in the Calls Pane, which opens the Call dialog box, described in the next section.

You can edit the text of existing entries in the Calls list by just clicking on the text and typing. Or right-click the item and choose Edit from the shortcut menu.

Setting call attributes

To set call attributes

Click in the right column of a blank or existing call to enter or change details. The Call dialog box appears.

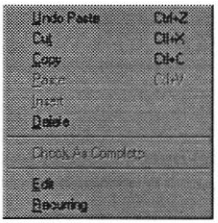


Modifying and deleting activities

Using the shortcut menu, you can modify or delete an Event, Call, or To Do item.

To modify or delete an activity using the shortcut menu

Right-click the item, and choose a command from the shortcut menu.



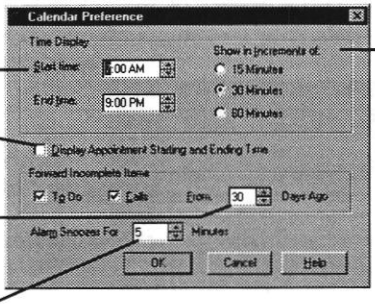
Choose Edit to revise or reschedule the activity, or Delete to remove it. The Recurring option opens the Recurring dialog box. Check as Complete places a checkmark next to the activity to indicate that you have completed it.

Customizing the Calendar

You can change your Calendar configuration to suit your personal working methods.

Setting Calendar Preferences

To enter or modify the Calendar preferences, choose Tools | Preferences | Calendar while in the Calendar view. The Calendar Preference dialog box appears.



Set the beginning and ending times, and the time increment to display. The range is 12 a.m. to 11:45 p.m.

Check if you want Start and End time displayed in the event slots.

Set the number of days ago TrueSync Information Manager looks to check for incomplete To Do items and Calls.

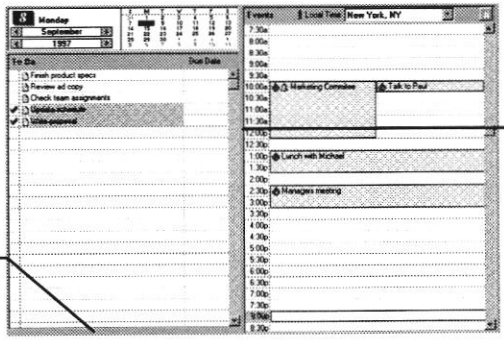
Set the time TrueSync Information Manager waits before repeating an alarm.

Set the increments that will appear in the Daily view of the Calendar.

The Forward Incomplete Items setting determines whether to forward incomplete tasks daily and how far back TrueSync Information Manager looks to find To Do items you have not checked off as completed. For best results, leave this value set to its maximum of 30

Customizing the Daily view

You can customize the Daily view of the Calendar in many ways. You can resize the Events, Calls, and To Do lists by dragging their edges. You can make the Calls list disappear by dragging down its edge to the bottom of the To Do pane. The size and position of each pane is retained the next time you start TrueSync Information Manager.



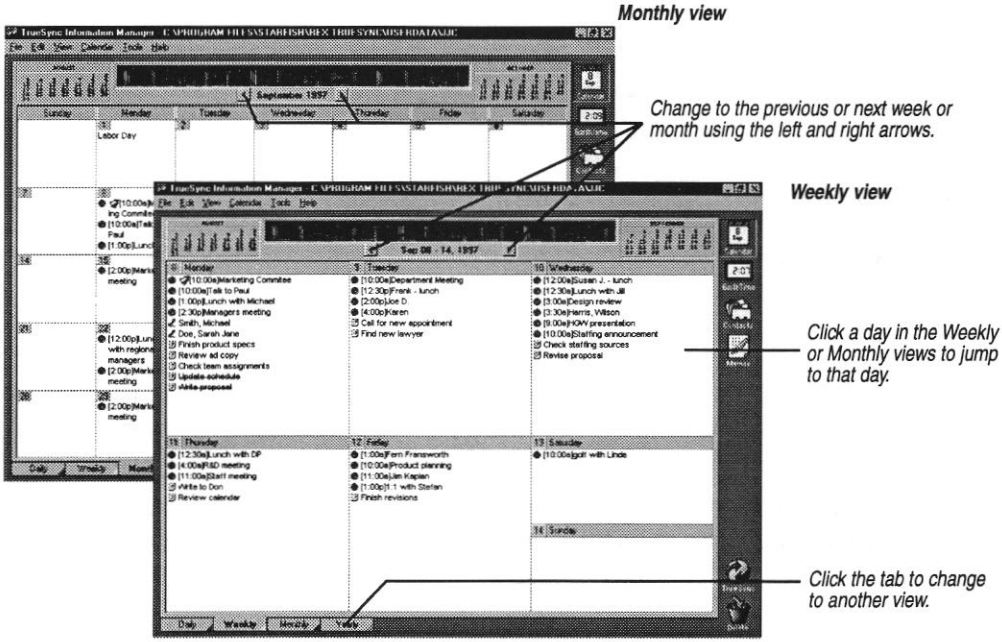
The Calls pane has been closed (some people prefer to enter calls in the same list as To Do items). Drag upward here to reopen it.

Drag the border to change the width of the panes.

The Weekly and Monthly views

The Weekly and Monthly views display events, calls, To Do items, special days, and multi-day events in standard calendar formats.

Switch to the Weekly or Monthly view in the Calendar by clicking their view tabs or by choosing View | Weekly View or View | Monthly View.



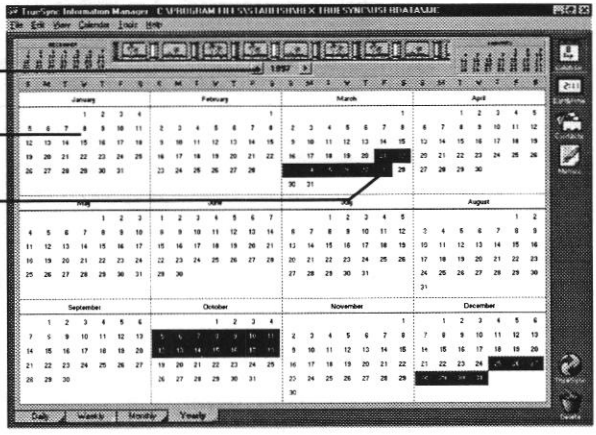
The Yearly view

The Yearly view displays only multi-day events, such as vacations and conferences. Switch to Yearly view by clicking its view tab.

Change to the previous or next year using the left and right arrows.

Click a day to quickly jump to that day in the Daily view.

Drag the mouse over a range of dates to schedule multi-day events.



Entering activities from different views

To schedule daily events from the weekly, monthly and yearly views

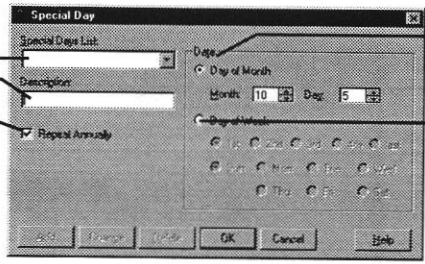
- Choose Calendar | Events | Single Day. The Schedule An Event dialog box appears.
- Or choose Calendar | To Do items or Calendar | Calls and the appropriate dialog box appears.

Adding special days

Special occasions, like birthdays, anniversaries, or other events that you want to be reminded of, can be added to the Calendar as special days. Special days appear on top of the Events pane in the Daily view.

To add a special day

1 Click the Special Day icon in the Toolbar, or choose Calendar | Events| Special Day. The Special Day dialog box appears.



Choose a day from this list or enter a new special day here.

Check if this day occurs annually.

If the special day falls on the same date every year, click Day of Month and choose the exact date.

If the special day is on a different date every year, click Day of Week and specify when the day occurs.

2 Enter a name of the special day into the Description text box, or choose a predefined special day from the Special Days list.

3 Select the type of special day.

Day of Month is the month and day on which the special day occurs, such as February 20.

Day of Week is the week of the month and the day of the week that the special day occurs.

4 Click Add to place the event in the Special Days list.

Continue to add other special days following the same steps. All the special days are listed in the Special Days list.

To change the settings for a special day

Select the day in the Special Day list, make the changes, then click Change to save the changes.

To delete a special day

Select it from the Special Day list and click Delete.

Scheduling multi-day events

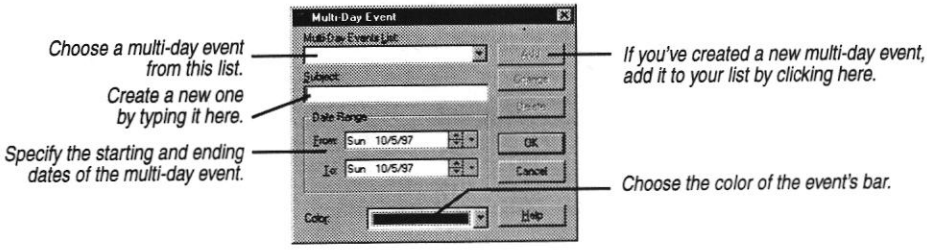
You can schedule multi-day events such as conferences, all-day meetings, or vacations. Multi-day events can be of any duration (even one day).

A multi-day event appears in the title bar of the daily Events pane. In the Weekly, Monthly, and Yearly views, the multi-day event appears as a bar extending from the starting date to the ending date. In the Weekly and Monthly views, the description also appears on the bar.

Up to four overlapping multi-day events can be displayed at one time in the monthly view.

To create a multi-day event

1 Choose Calendar | Events | Multi-Day. The Multi-Day Event dialog box appears.



2 Type the name of the multi-day event in the Description text box.

3 Select the month, day, and year for the starting and ending dates of the event.

4 Select a color for the event's bar.

5 Click Add to add the event to your calendar and place the event in the Multi-day Events list.

To reschedule a multi-day event

Select the event from the Multi-day Events list and change the settings for the starting and ending dates. Click Change to save the changes.

To delete a multi-day event

Select it from the list and click Delete.

To quickly schedule multi-day events from the Yearly view

1 Place the pointer on the date your event begins. Hold down the mouse button and drag to the ending date.

2 Release the mouse button. The Multi-Day Event dialog box appears.

3 Enter a description, choose a bar color for the multi-day event, and click Add.

Searching the Calendar

It's easy to find specific activities in your Calendar by searching for text in the descriptions or Regarding notes.

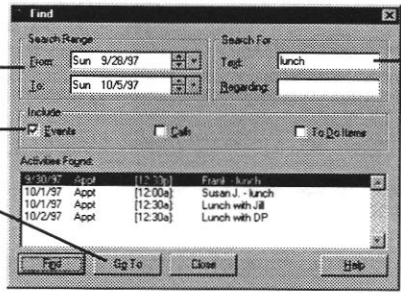
To search for calendar items

From the Daily view, Choose Edit | Find, click the Find (binoculars) icon on the Toolbar, or type *Ctrl+F*. The Find dialog box appears.

Select the range of dates to search in the Calendar. The minimum time period is one day.

Select the activity lists to include in the search.

Select one of the found activities and click Go To to jump directly to that event. Choose Find, or click the Find button, to return to this list.



Enter the text for the subject or notes to find. If you enter text in both fields, only those entries that meet both criteria are found.

When ready, click Find to search the Calendar. All activities that match the search criteria are listed in the Activities Found box. Double-click an activity in the list, or select the item and choose Go To to switch to it in the Daily view.

Working with Calendar files

A single TrueSync Information Manager Calendar is composed of as many as nine separate files. TrueSync Information Manager uses part of the calendar name to differentiate the different files. When working with TrueSync Information Manager calendar files, it is best to use the menu commands rather than the Windows Explorer, or other editor programs. To copy a calendar, open it and then choose File | Save Calendar As and rename the file.

Using multiple calendars

You can create multiple calendars to keep different kinds of calendar information, although only one calendar can be open at a time. You might keep one calendar for yourself and one for your manager, for example, or you might want separate calendars for your business and personal use.

If you need multiple calendars, you can open and save them just like any other files.

CAUTION TrueSync Information Manager calendar files should not be shared in a network environment. Attempting to share them by storing them on a network drive and letting more than one user simultaneously access them could result in loss of information.

Use the commands listed in the following table to work with multiple calendars.

Task	Command
Opening a Calendar	Choose File	Open Calendar and select the appropriate calendar name.
Creating a new Calendar	Choose File	New Calendar. Begin entering data.
Saving a Calendar	Choose File	Save Calendar. Or, save changes to a new Calendar file by choosing File	Save As, and entering a new Calendar file name.
Importing a calendar	Choose File	Import Calendar. Select the format you want from the Files of Type list.

Deleting activities

You can free up space in your Calendar files for new entries or delete information that is no longer needed. The activities that fall within a range of dates you set are deleted.

To delete activities

1. From the Daily view, choose Calendar | Delete. The Delete Activities dialog box appears.
2. Select the types of activities you want to delete. You can delete Events, Calls, or To Do items.
3. Select the range of dates in the calendar from which you want to delete all activities from the lists selected. One day is the minimum time period allowed.

CAUTION Before you proceed, check that all settings are correct and save your calendar. There is no undo option.

4. Click OK to delete the activities you specified.

Importing Calendar information

TrueSync Information Manager can import calendar files from Microsoft Outlook 97/98, Microsoft Schedule+ 7.0/ 7.0a/7.5, and Lotus Organizer 97/97GS, and Symantec ACT! 3.06/3.0.7/3.0.8. After you import a calendar file, you can synchronize it from TrueSync Information Manager to your REX card.

NOTE When you import a calendar file, TrueSync Information Manager normally merges that file with any currently open calendar files, which can create duplicate calendar entries. To prevent creating duplicate calendar entries, save each imported calendar file as a new calendar when you import it, following the steps below.

To import files into the Calendar view

1. From the Calendar view, choose File | Import Calendar.
2. Choose File | New Calendar.
3. Choose File | Save Calendar As.
4. Type a calendar file name (e.g., your name or initials) and then click OK.
5. If you typed a previously used calendar file name, "User name already exists. Replace the existing name?" appears. Click Yes to overwrite the previous calendar file.
6. Choose File | Import Calendar and then choose a calendar format.
7. If you chose Schedule+ 7.0/7.0a/7.5 or Lotus Organizer 97/97GS, choose a file to import and then click Open.

To view Sidekick 97 or Sidekick 98 calendars

Choose File | Open Calendar and navigate to the Sidekick Userdata directory. Then choose the calendar file and click OK.

4

The Contacts view

The Contacts view lets you store, manage, and retrieve personal information stored in cardfiles. Each cardfile can contain full address information and numerous other details about your contacts.

Once you have updated your cardfiles, you can use the TrueSync synchronization software to transfer them to your REX card.

To open the Contacts view, click its Deskpad icon, choose View | Contacts, or press *F5*.

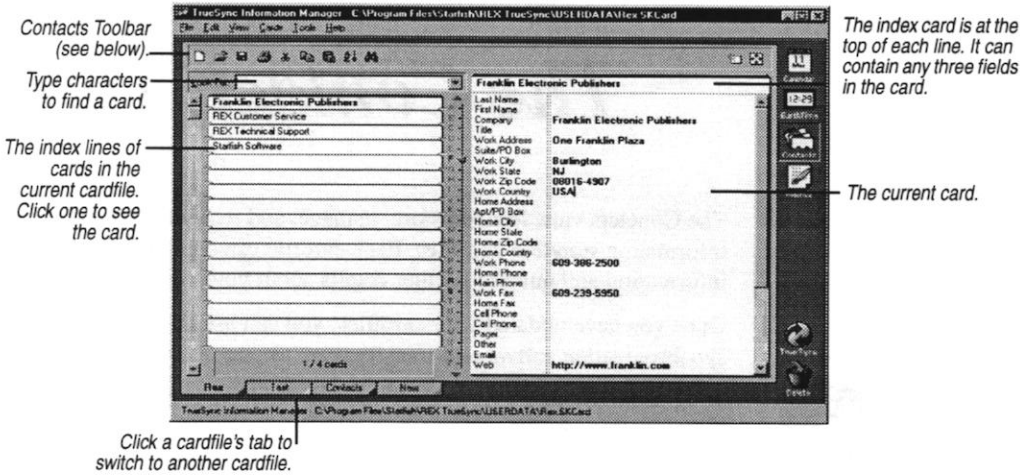
This chapter explains how to

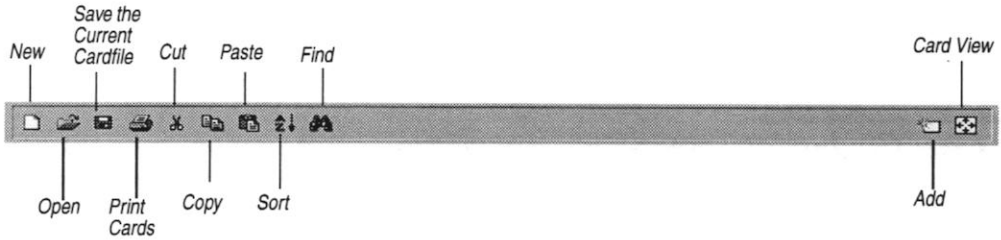
- Create a cardfile
- Work with multiple cards and cardfiles
- Search for and extract information from a cardfile

Cardfile basics

In the left pane of the Contacts view is the card list, your visual index to the cards in the *active cardfile*—the cardfile whose tab is selected. In the right pane is the *current card* in the cardfile. You can review and edit the information in the current card directly.

The following figure shows the Contacts view.





Here are some of the key concepts of cardfiles:

- The cardfile contains customizable fields that you can use to organize the information on the cards. Each cardfile can have up to 30,000 cards.
- A cardfile consists of fields. Each card can have up to 100 fields.
- At the top of each card is the index line, which can contain any three fields in the card. Cards are sorted alphabetically, in ascending (A–Z) or descending (Z–A) order by their indexes. You can specify which fields appear in the index.

- The field names describe the contents of each field. A field name can be up to 39 characters in length.
- Each cardfile can contain a maximum of 4800 characters.

On the bottom of the screen are tabs indicating which cardfiles are currently open. The tab that appears to be on top of the others is the active cardfile.

Opening, closing, and saving cardfiles

You can choose File | Open Cardfile to open as many cardfiles as you like. Each open cardfile appears as a tab at the bottom of the screen. If there isn't room for all the cardfile tabs, TrueSync Information Manager displays scroll buttons you can click to bring additional tabs into view.

To go directly to any cardfile
Click its tab.

To reorder the cardfile tabs
Press *F11*. In the Reorder Cardfile Tabs dialog box, move cardfiles up or down in the list to create the order you want.

To save a cardfile
Choose File | Save Cardfile. Choose File | Save Cardfile As to save the file under a different name or to save in a different format.

To close cardfiles
Choose File | Close Cardfile to close the current cardfile. To close several cardfiles at once, choose File | Close Cardfiles and select the files you want to close in the dialog box; use *Shift+click* or *Ctrl+click* to select multiple files.

NOTE If you close all of the cardfiles, an empty, untitled cardfile will be the current cardfile.

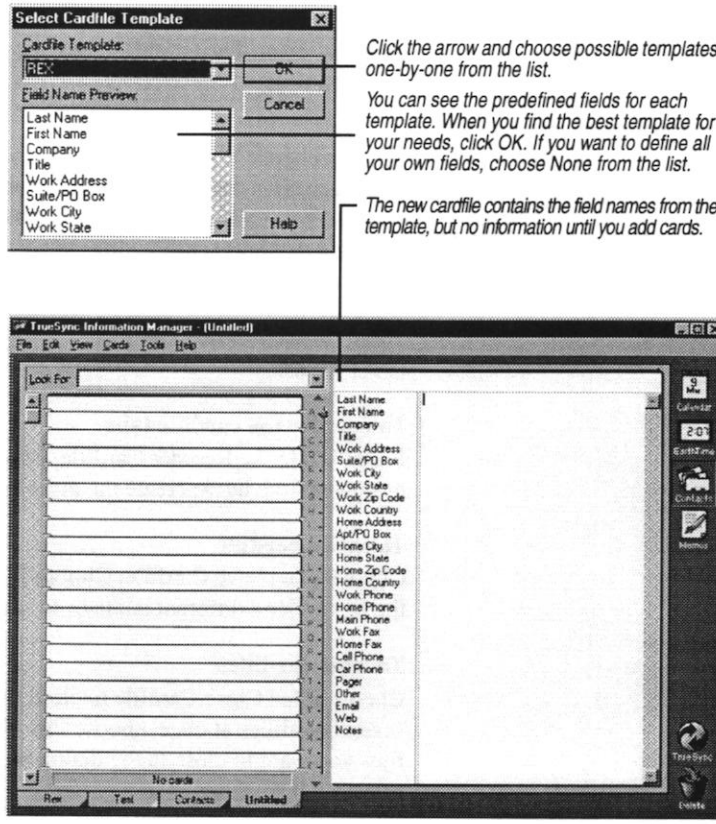
Creating a cardfile

When you create a cardfile, first decide what fields you want on each card. You can create all these fields yourself, or you can use a *template*—an empty cardfile that already has fields in place. If you select a template, you can customize it, keeping some or all of its fields and adding your own. If you're creating a cardfile based on an imported file with its own fields, see "Importing and exporting cardfile information" on page 57.

To create a new cardfile

Choose File | New Cardfile. Choose the template you want from the list that appears, as shown below, if needed.

NOTE: If no cardfiles are open, use Cards | Define Fields to open this dialog box.



You can use any of the cardfile templates provided with TrueSync Information Manager. If you want to customize a cardfile, you may find it easier to edit the provided field names of a cardfile template rather than creating all of the field names yourself.

If you want to define fields or change any fields after creating the cardfile, see the next section, "Adding and changing cardfile fields." If you're ready to begin entering information into your new cardfile, see "Adding cards" on page 47. For another way to create new cardfiles from existing cardfiles, see "Extracting cards" on page 54.

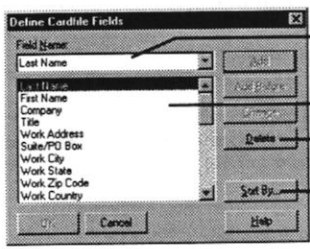
Adding and changing cardfile fields

The Define Cardfile Fields dialog box is where you create new fields for a new cardfile, edit existing fields that were provided by a template, or change field names. If you do not select a template, when creating a new cardfile, the Define Cardfile Fields dialog box will automatically appear.

NOTE The REX card was designed to store business and address book information such as phone numbers and addresses. If you create a cardfile containing field names that do not correspond to the cardfile field names on the REX card, you may have some difficulty placing the fields where you want.

To add or modify cardfile fields

Choose Cards | Define Fields. The Define Cardfile Fields dialog box opens.



To add a field, type a name in the Field Name box or choose from the drop-down list. Then click Add, or click an existing field and click Add Before.

To change a field name, first select it from the list. Then type the new name and click Change.

To delete a field, select it from the list and click Delete.

Click Sort By to set which fields to sort the cardfile by.

When you have defined the fields, click OK to save the changes you made and update the cards in the cardfile.

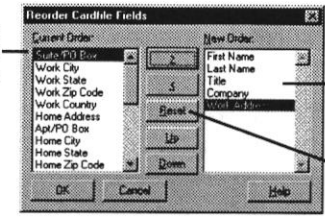
CAUTION Be careful when deleting a field; deleting removes the field itself and, for a cardfile containing data, any data contained in that field on every card. Be sure to save your data. There is no Undo when you delete a field.

Reordering fields

To change the order of the fields in a cardfile

Choose Cards | Reorder Fields to open the Reorder Cardfile Fields dialog box.

Double click fields in the order you want them, or click each and then click the >> button.



To rearrange fields, click a field and then click Up or Down to move it within the list.

Click Reset to return to the original order of the fields.

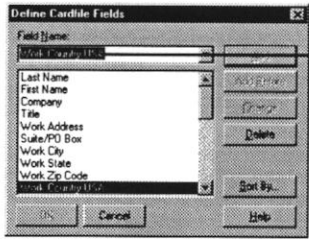
Default field data

When you add a new card, you can have a default value in any field that appears automatically when you create a new card. For example, you can have TrueSync Information Manager automatically enter USA in the Country field for every new card added to a file. You can change the information once it appears on a card, just like any other information you've entered.

NOTE If you already have cards in the cardfile, specifying this default text won't add it to them. It only adds the text to new cards you create after specifying the text.

To specify default data for a field

Choose Cards | Define Fields. The Define Cardfile Fields dialog box appears.



Select the field and type a colon (:) followed by the default information you want. In this example, "USA" will appear in the Country field of new records. (You can change it for non-US addresses by typing over it.)

Using numbers in fields

Cardfile fields are text fields, not numeric fields. This means that when you enter numbers, you should use leading zeroes if you want the number to be sorted correctly. For instance, if you enter the numbers from one to twenty into fields, TrueSync Information Manager sorts them as 1, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 2, 20, 3, 4, 5, 6, 7, 8, 9

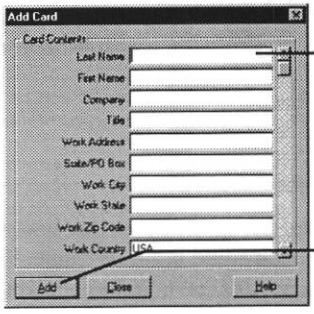
If you use leading zeroes, they would sort properly: 01, 02, 03, 04, and so on.

If you want to use numeric dates in an index line for sorting, you should enter them in year/month/date format, such as 96/10/14 or 96-10-14.

Adding cards

To add a card to the cardfile

Choose Cards | Add, or click the Add Cards button on the Toolbar. The Add Cards dialog box appears with a list of the fields that are set up in the cardfile.



Type the information for each field in the list. To move from one field to the next, use the up and down arrow keys or the Enter key.

Click Add to insert the card in the cardfile. You can then begin entering information for another new card, or click Close.

Duplicating cards

Sometimes it is useful to make several copies of one card, and then customize the information as needed. For example, if you are entering information for several people who work at the same company, you can duplicate the shared company information, and then add the individual name and phone information for each person.

To duplicate the current card

Choose Cards | Duplicate. Select the number of copies to make and choose OK.

Editing and viewing cards

Once a card has been added to the cardfile, you view its contents by clicking its index line, as shown in the figure on page 48. You can change or add information by typing directly on the card.

To edit a card

1. Select the card by clicking its index line.
2. Click in the field you want to edit. Type new information or make whatever changes you want.

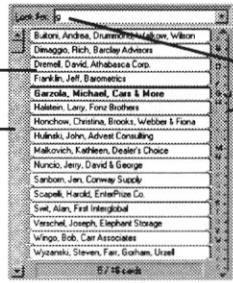
Navigating through the cardfile

If you have a large cardfile, there are several ways to navigate through it quickly to find the card you want.

To navigate quickly through large cardfiles

Type the first letters in the Look For box. The cursor jumps to the first card whose index starts with that letter or group of letters. See "Quick searches" on page 51.

The navigation aids are shown in the following figure:



Click the index line to select a card.

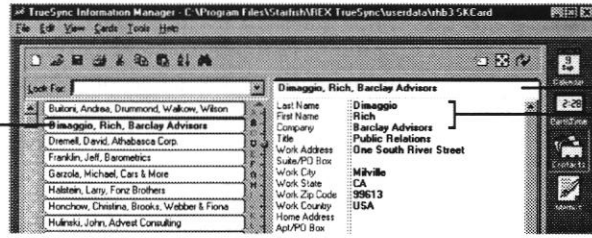
Scroll bar. Click the arrows, or drag the slider up or down to move through the cardfile.

Type the first letter to jump to the first card whose index starts with that letter.

Or you can click the letter you want in the scale, or drag the marker up or down.

Sorting the cardfile by index

Every card has an index, or title line, with up to three fields. For example, you could use Last Name, First Name and Company fields for an index, as shown in the following figure.



Card indexes appear here.

Click the index to view the card.

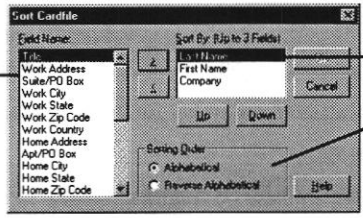
This index... consists of the information in these three fields.

TrueSync Information Manager sorts the cards alphabetically (or reverse alphabetically, if you choose) according to its index. If you choose Last Name, First Name, and Company for the index line, the cards are arranged alphabetically by last name, then first name, and then company name.

In addition to determining the sort order, the index determines what appears at the left side of the screen. If you want to be able to see a telephone number for each card at the left side of the window, be sure to include the telephone field in the index.

To define the index

Choose Cards | Sort or click the Sort button on the Contacts Toolbar. The Sort Contacts By dialog box appears.



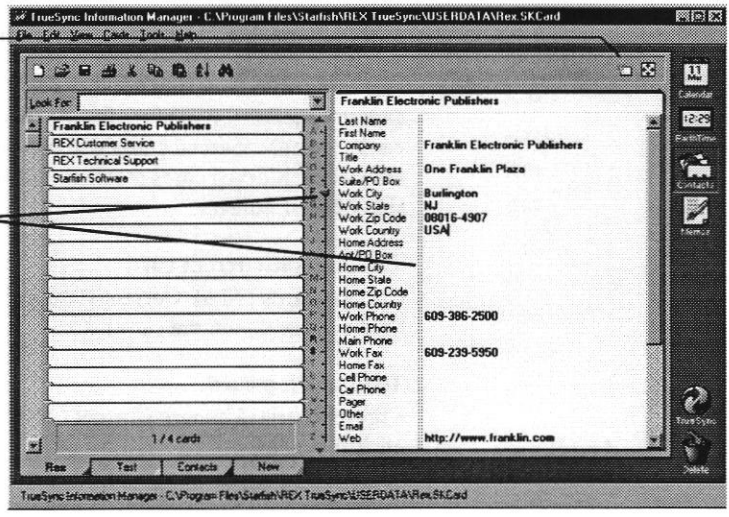
1 *Select up to three fields one-by-one and click > to move them to the Sort By list.*

2 *You can change field order by clicking one and using the Up and Down buttons to move it.*

3 *Choose the sorting order (Alphabetical or Reverse Alphabetical) for the card list.*

Changing the view

There are several options for changing the way your information appears in the Contacts view, as shown in the following figure.



Click to switch between Index view (shown) and Card view (full screen, one card at a time).

Drag any of these borders to adjust viewing areas.

Resetting fonts

You can also change the fonts for various parts of the Contacts view. Right-click a text area, and choose Font.

Selecting and working with multiple cards

In addition to editing the information in the fields on a card, you can perform various actions—like deleting—on the card itself. You can even perform these actions on several cards at once, after you select them.

To select multiple cards, do either of the following:

- Click a card's index line in the card list, and then press *Shift* and click another card's index. The two cards and all cards between them are selected.
- Press *Ctrl* and click several cards' indexes in the card list. Only those cards you *Ctrl*-click are selected.

You can perform many functions on multiple cards:

- Deleting
- Printing (see Chapter 8)
- Copying or moving cards from one cardfile to another (see "Moving cards between cardfiles" on page 55)
- Merging cards with memos (see "Personalizing memos" on page 76)
- Extracting (see "Extracting cards" on page 54)

Marking cards

Marking cards gives you another way to specify a group of cards for certain functions. It is more lasting than merely selecting multiple cards, because marked cards will remain marked until specifically unmarked. Marked cards are distinguished by a red triangle on the left side of their indexes.

To mark the current card

Choose Cards | Mark Current Card, or press *Ctrl+K*, or right-click the card's index line in the card list.

To unmark a card

Choose Cards | Unmark Current Card, or press *Ctrl+K* again, or right-click the index.

To unmark all marked cards in a cardfile

Choose Cards | Unmark All.

Deleting cards

To delete cards

Select each card in the card list and drag it to the Delete icon. Or choose Cards | Delete to open a dialog box where you can choose to delete the current card, selected cards, marked cards, cards with blank indexes, or an index range.

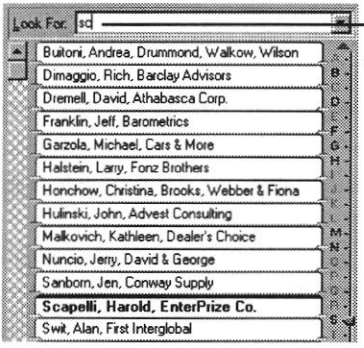
Searching for cardfile information

TrueSync Information Manager has several powerful tools for finding information in a cardfile. You can search for simple text strings, such as names, cities, numbers, and so on, or specify conditions to search for in particular fields of a cardfile. TrueSync Information Manager displays the first card matching the search criteria as the current card.

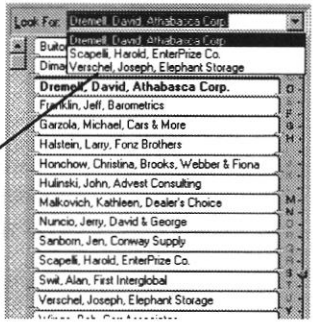
Quick searches

You can search the Card list for text contained in the index lines of each card. As you type text into the Look For box, TrueSync Information Manager displays the first card whose index begins with the characters you're typing.

In the following example, typing "s" takes you to the first record whose index begins with the letter "s". Adding a second letter to make "sc" takes you to the first record whose index begins with "sc".



When you type "sc" in the Look For box, TrueSync Information Manager moves immediately to the first record whose index begins with "sc".



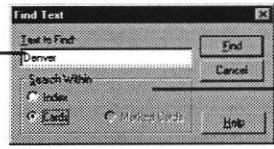
If you press Enter after typing "sc", TrueSync Information Manager displays the first 20 records that contain "sc" anywhere in their index (to see this drop-down list, click the down arrow button to the right of the Look For box).

Searching for text within a card

You are not limited to searching card indexes. You can search all information in the active cardfile for any text string. It can be any letter, number, word, or combination of letters, numbers, or multiple words. For example, you can find the card for the person whose company name you remember but whose name you've forgotten, or you can find all cards with the same city entry.

To search for a text string in a cardfile

Choose Edit | Find | Text, click the Find Toolbar button, or press *Ctrl+F*. The Find Text dialog box appears.



Type the text you want to find. You can search for complete and partial text matches, dates, or combinations of numbers.

Select the part of the cardfile to search for the text.

Click Find to begin the search. TrueSync Information Manager locates the first matching card.

Choose Edit | Find Next or press *F3* to continue the search and go to the next match. Choose Edit | Find Previous or press *Shift+F3* to move to the previous match.

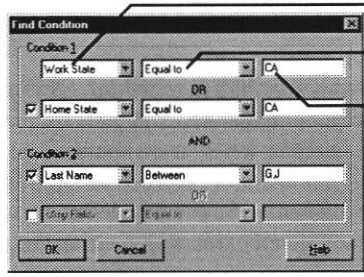
Finding specific conditions

You can search the active cardfile for specific conditions. For example,

- You might want to find cards that show rates of more than $50 but less than $100.
- You might want to review records of customers living in either Texas or California.
- You might want to find people you have identified as attorneys or accountants in your address list.

To perform a conditional search

Choose Edit | Find | Condition. The Find Condition dialog box appears.



1 Select the first field to search in Condition 1.

2 Select the operator you want from the operator list.

3 Type the value you want to find in the selected field.

For additional conditions, check the appropriate condition's check box and repeat Steps 1 through 3. See "Specifying operators" for an explanation of operators.

When you have specified all the conditions you want, choose OK. The first card in the active cardfile meeting the specified conditions appears.

Choose Edit | Find Next or press *F3* to continue the search and go to the next match. Choose Edit | Find Previous or press *Shift+F3* to move to the previous match.

Specifying operators

When searching for conditions on cards, the contents of the fields are compared to values you specify. The comparison is done with a condition. A condition is an equation consisting of a field name, an operator, and a value.

For example, a simple equation might be State equal to TX. As TrueSync Information Manager searches the active cardfile, it compares information on each card with the equation. If the equation is true—when the State field on a card equals TX—the card meets the condition.

Conditional operators can be used with letters or numbers. For example, finding a card with a name greater than Baker would find the first name alphabetized after Baker, such as Bridges.

Field name	Operator	Sample value	Search result
City	Equal to	San Jose	Any card with San Jose in the City field.
Country	Not Equal to	United States	Any card that doesn't have United States in the Country field.
Income	Greater than	10000	Any card with a number greater than 10000 in the Income field.
Age	Greater than or Equal to	18	All cards with the number 18 or higher in the Age field.
Investments	Less than	500	Any card with a number smaller than 500 in the Investments field.
Price	Less than or Equal to	49.95	Any card with the number 49.95 or lower in the Price field.
Last_Name	Between (range)	Bas,Smi	Any card with a last name entry that begins with the letters Bas through Smi.
Zip	Outside of (range)	91000,95000	Any card with a Zip code that is less than 91000 or greater than 95000.

Specifying conditions

Keep these tips in mind when specifying conditions:

- Don't use commas in numbers. They are reserved for ranges. To enter a number like ten thousand, type 10000, not 10,000.
- When entering a range with the Between operator, separate the high and low ends of the range with a comma. For example, to indicate the range of years from 1990 to 1997, type 1990,1997. To indicate the range of words from smi to tru, type smi,tru. Searches are not case sensitive.
- Don't use quotation marks around words unless the information in your fields have quotation marks as well.
- Use <Any Field> to search all fields for text. For example, <Any Field> Equal to SMITH searches for the cards in the cardfile that contain Smith regardless of the field it's in. <Any Field> works only with the Equal To or Not Equal operators.

Extracting cards

Extracting cards is a way of searching for cards and automatically copying them into a new, untitled cardfile. All the types of searches described previously can be the basis for extracting cards into a new file.

Extracting on index range

To copy a range of cards to a new cardfile

1. Be sure the field you want to use for the range is the first field in the index. If necessary, click the Sort button and change the index.
2. Choose Tools | Extract Cards | On Index Range.
3. Type the letters you want to begin the range in the From text box, and the letters to end the range in the To text box.
4. Choose OK.

A new cardfile appears containing copies of only those cards from the original cardfile that were found within the alphabetical range specified.

Extracting on text

To copy all the cards in a cardfile that contain a specified text string to a new cardfile

Choose Tools | Extract Cards | On Text. The Extract On Text dialog box appears. Type the text you want to find and choose the part of the cardfile you want to search.

When the search is complete, a new, untitled cardfile appears containing copies of only those cards from the original cardfile that were found with the specified text string.

Extracting on condition

Extracting cards on condition is just like searching a cardfile for specific conditions. The only difference is that instead of merely jumping to the first card matching your condition, the Extract Cards On Condition function creates a new cardfile containing *all* the cards matching your conditions.

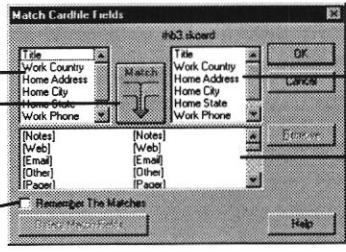
To copy any cards in a cardfile that meet certain conditions to a new cardfile

Choose Tools | Extract Cards | On Condition. The Extract Cards On Condition dialog box is similar to the Find Condition dialog box discussed on page 52. When the search is complete, a new cardfile appears containing copies of only those cards from the original cardfile that meet the specified conditions.

Moving cards between cardfiles

You can move a group of selected cards between cardfiles by dragging them. (See "Drag and drop" on page 16.) Dragging a group of cards onto another cardfile's tab moves those cards into the other cardfile. If you want to copy cards instead of moving them, press and hold *Ctrl* while dragging and dropping them.

When you move cards between two cardfiles that use different field names, the Match Cardfile Fields dialog box appears. This dialog box lets you choose how to map the different fields from one cardfile to another.



The cards are being moved from the file BUSINESS.SKCARD, which contains these fields.

Select a field from each file to match, and click the Match button.

Click to have TrueSync Information Manager use these matches the next time it finds the same fields.

The cards are being moved to the file PERSONAL.SKCARD, which contains these fields.

Matched fields appear here.

The Match Cardfile Fields dialog box automatically matches fields that share the same name in both cardfiles. You can match other fields manually, by selecting a field from each cardfile and clicking the Match button. You can remove an incorrect match by selecting it and clicking the Remove button. To change the list of remembered matches, click Delete Match Fields.

The cards you dropped into the target cardfile now have that cardfile's fields. If you matched fields between the two cardfiles, information is moved accordingly. Information from unmatched fields will be placed in the last field of the new card.

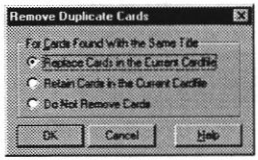
Merging two cardfiles

You can merge information from one cardfile into another. For example, you might want to combine the addresses from your personal address cardfile with your business address cardfile to create a single address cardfile. When you merge cardfiles, TrueSync Information Manager adds the fields and the information from one cardfile into another.

CAUTION There is no undo option for merges. When you merge cardfiles, the cardfile you add information to changes to accommodate the information and fields being merged. If you want to keep a copy of the original cardfile, save the merged cardfile to a different name. Of course, you can always discard the merge result by closing the cardfile without saving.

To merge two cardfiles

1. Open the cardfile you want to add cards to. If the cardfile is already open, click its tab to select it.
2. Choose Tools | Merge Cardfile. The Merge Cardfile dialog box appears.
3. Select the cardfile you want to merge into the open cardfile, and click Open.
4. The Remove Duplicate Cards dialog box appears.



Choose how to handle cards that have the same index line.

- **Replace Cards** replaces the cards in the currently open cardfile with the cards from the second cardfile.
- **Retain Cards** retains the cards in the currently open cardfile and ignores the cards in the second cardfile.

- **Do Not Remove Cards** keeps all cards, including any duplicates.

5 The Match Cardfile Fields dialog box appears (see page 55). Specify any matches you want between fields by selecting a field from each cardfile and clicking the Match button. Click OK when done.

The merge combines all of the information from the two cardfiles into the open cardfile.

NOTE A cardfile is limited to 100 field names and 30,000 total cards. If the number of cards resulting from a merge would be greater than 30,000, you will see a message, and the merge will not occur.

Importing and exporting cardfile information

You can import and export cardfile information to and from other organizer and database applications listed in the following table. If you use an application that can save in one of these formats, TrueSync Information Manager can import the information. Then you can synchronize that information to your REX card.

NOTE TrueSync Information Manager uses the same file format as Sidekick 97 and Internet Sidekick. You can open these Sidekick files in TrueSync Information Manager without importing them.

Importing and Exporting

The following table describes the file formats supported by TrueSync Information Manager Import and Export Wizards for cardfiles. To see the most up-to-date list of supported files, when you open the Import or Export Wizard, click the link to the Starfish Software Web site.

File Format	Description
Outlook 97/98 (import only)	Format used by Outlook 97/98.
Schedule+ 7.0/7.0a/7.5 (import only)	File format used by Schedule+ 7.0/7.0a/7.5
Lotus Organizer 97/97GS (import only)	File format used by Organizer 97/97GS.
ACT! 3.0.6/3.0.7/3.0.8 (import only)	File format used by ACT! Windows 95 program.
dBASE III	File format editable by most applications that can read dBASE.
dBASE IV	File format editable by most applications that can read dBASE.
Spreadsheet Data Interchange Format (.DIF)	File format editable by many spreadsheet and word processor applications. This format should not be confused with Navy Data Interchange (DIF), which is not currently supported.
Tab-delimited Text (.TXT)	ASCII text format in which each tab represents the end of a field. Tabs within quotation marks are treated as normal characters and not delimiters. There should be an even number of quotation marks in each line. A hard return represents the end of a record. The first line of the text file is used for cardfile field names.
Comma-delimited Text (.CSV)	Text file format in which each comma represents the end of a field. Commas within quotation marks are treated as normal characters and not field delimiters. There should be an even number of quotation marks in each line. A hard return represents the end of a record. The first line of text is used for cardfile field names.

Importing cardfiles

When you import information from other applications, TrueSync Information Manager converts the information to the TrueSync Information Manager cardfile format.

You can use the Import Wizard to import files in various formats, including Outlook 97/98, Schedule+ 7.0/7.0a/7.5, ACT! 3.0.6/3.0.7/3.0.8, Organizer 97/97GS, ASCII tab-delimited, comma-seperated, dBASE III and IV, and Spreadsheet DIF files.

If you prefer to continue using one of the above organizers, visit the Starfish Web site for more information about TrueSync Plus for REX by choosing Help | Enhancements | TrueSync Plus for REX.

Since the TrueSync Information Manager cardfile is a text-only database, special fields found in other file formats for dates, numbers, labels, etc., are converted to standard text fields when imported. Some formatting for these special fields may not be retained in the resulting cardfile.

NOTE If you use Ecco Pro, Goldmine, Day-Timer, or any other organizer not mentioned above, you can still import information by saving your files as any of the supported formats. For example, Ecco Pro can export files as comma-separated values.

To import text information into a cardfile

1. Choose File | Import Cardfile.

   The Contacts Import Wizard dialog box appears. If you want to visit the Starfish Web site for additional information on import formats, click the Go to Starfish Website button.

2. Click the Next button to go to the Select File to Import Screen.

3. If you have Outlook 97/98 and want to import information from it, click Import from Outlook 97/98. Otherwise, click Import from Other File and enter the name of the file you want to import.

   Or click the Browse button and select a file. Choose the file type you want to import from the Files of Type drop-down list and then click the Open button.

4. Click the Next button.

5. From the Select Target File dialog box, type the desired name of the target file and click the Next button.

6. Select the fields for the new TrueSync Information Manager file.

   Select a field and click Add, or choose Add All to select every field. You can click Remove to remove a field from the Fields to

Import list. You can also click Remove All to start the selection process over again.

NOTE If no fields are available, you might need to open the file in another application, such as a text editor, and add the field names you want to use in the cardfile before continuing with the import.

7 Click the Finish button when done.

Once you have imported a cardfile it opens automatically. You may want to sort the cards to rearrange the way information appears on the screen by choosing Cards | Sort.

Exporting cardfiles

When you export information from a cardfile to another application, TrueSync Information Manager converts it to the appropriate file format.

To export a cardfile

1 Choose File | Export Cardfile.

The Contacts Export Wizard opens.

2 Click the Next button.

3 Type the complete name (including the file extension) of the cardfile that you want to export. Or click the Browse button to search for the desired file name.

4 Click the Next button.

5 At the Select Target File dialog box, select the name for the Target File and click the pull-down menu to select the Target File Type.

If you select a different file type, the extension of the target file will change automatically.

6 Click the Next button.

7 In the Select Fields to Export dialog box, select the fields in the cardfile that you wish to export by selecting them from the left column and then clicking Add. To export the entire cardfile, click Add All.

8 Click the Finish button when done.

NOTE For more information on the maximum values supported when importing and exporting cardfiles (for example, the maximum number of characters per field), double-click the "Importing and Exporting Files" chapter in the online help table of contents, and see "Importing and Exporting: Maximum Values."

5

The Memos view

The Memos view lets you create memos, organize them in folders, and save them as memo files. You can apply formatting to your memos, and you can even create memos to merge with names from a cardfile.

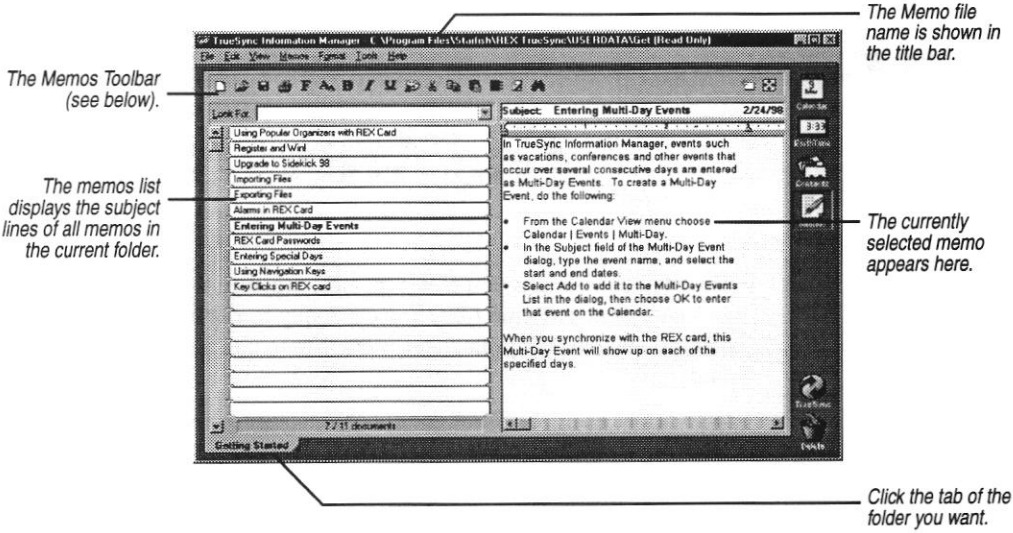
In addition, using the TrueSync synchronization software, you can transfer your memos to your REX card for reading and reference anywhere. You can even import memo and text files from other PC organizer programs into TrueSync Information Manager and then synchronize them to your REX card.

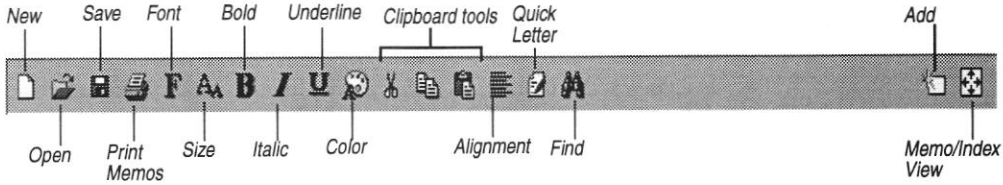
To open the Memos view, click the Memos Deskpad icon, press *F7*, or choose View | Memos.

This chapter explains how to

- Create and edit memos, and organize them in memo files and folders
- Use Memo templates provided with TrueSync Information Manager
- Use Quick Letter and mail merge
- Import and export text and rich text format (RTF) files to and from the Memos view

The following figure shows the Memos view.





Memo files, folders, and memos

Memo files help you organize your memos by topic. A Memo file can contain many folders. Each folder contains one or more memos.

Each folder in a Memo file is identified by a tab at the bottom of the Memos screen. Using folders, you can organize memos according to projects, tasks, people, subject, or any other grouping.

Creating memos

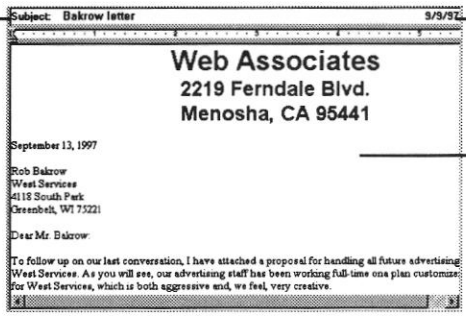
To create a memo

1 Click the tab of the folder where you want the memo.

2 Click the Add button or choose Memos | Memo | Add. A new, blank memo appears, with the insertion point in the subject line.

3 Type a subject, and then press *Enter* to move into the body of the memo. Type your text.

When you create a new memo, you type its subject line first.

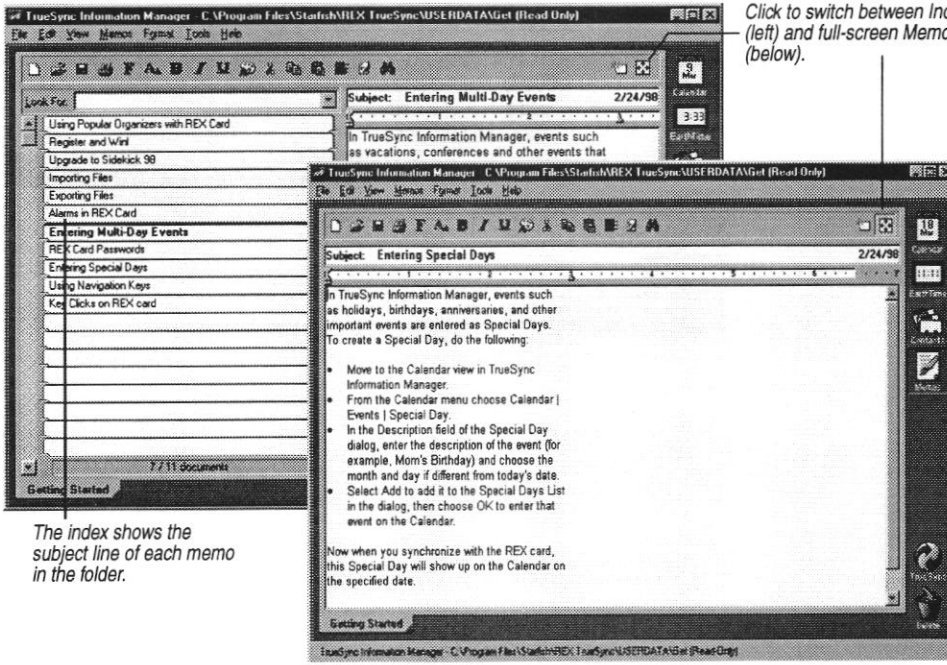


The date the memo was created appears here.

Type directly in the memo.

Using full-screen editing

You can edit memos in a full-screen Memo View or in Index View. The Index View makes it easy to find a memo title. The full-screen view is easier when you have a lot of writing or formatting to do.



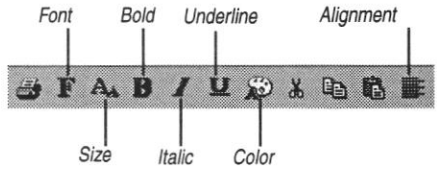
The index shows the subject line of each memo in the folder.

Fonts and formatting

The Memos Toolbar provides options for changing type size and style. You can also change paragraph alignment—left-aligned, centered, right-aligned. (To change the default font for new memos, use Tools | Preferences | Memos.)

To change the type size or appearance

Highlight the text you want to change, and then click the formatting button you want.



To change paragraph alignment

Click in the paragraph, or highlight the paragraph(s) you want to change. Then click the Alignment button, and select the desired paragraph alignment.

To add a bullet to a paragraph

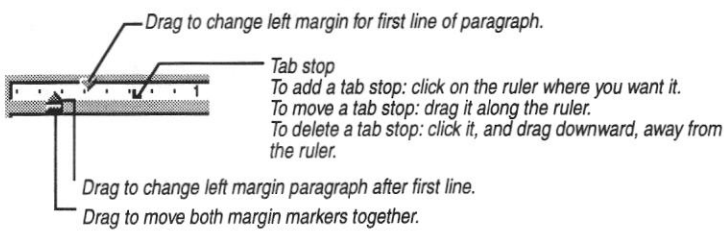
Click in the paragraph, or drag the mouse through several paragraphs. Then choose Format | Bullet.

Changing margins and tabs

Use the ruler when you want to change margins or set a tab stop. To change more than one paragraph, select the paragraphs before you adjust the ruler.

To see the ruler

Choose View | Ruler.



If you create a new paragraph by pressing *Enter* at the end of an existing paragraph, the new paragraph retains the margins and tabs of the existing paragraph.

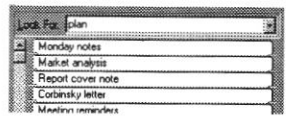
Finding text

You can search through the memo indexes or the memos at the click of a button. You can search for text either using the Look For box or using the Find dialog box.

The Find dialog box gives you more flexibility in searching for text. It searches through the current memo, all memos in the current folder, or in all folders you specify in the current memo file.

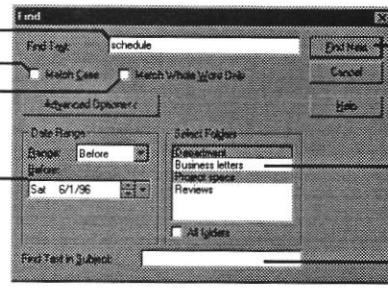
To find text in the memo indexes using the Look For box

Type the characters in the Look For text box, and press *Enter.*



To find text using the Find dialog box

Click the Find icon, or click Edit | Find. You can then search the current memo. To set search criteria, click the Advanced Options button.



Setting search options

Clicking Advanced Options lets you choose other search criteria, including which folder(s) to search.

The options available in the Find dialog box are

- **Match Whole Words Only**. Find only if the characters you enter appear as a separate word in the text.
- **Match Case**. Find only if the capitalization matches the characters you entered.
- **Date range**. Limit search to dates before a date, between two dates, or after a date.
- **Select Folders**. Specify all folders or only certain folders.

Found text

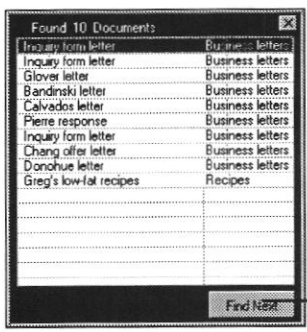
TIP

If you use any Advanced Options in the Find dialog box, TrueSync Information Manager automatically opens the Found list to show you all memos where the text was found.

Once you have completed a search using the Find dialog box, you can see all instances that TrueSync Information Manager has found of the text you entered.

To see all instances of your Find text

Choose Edit | Found Text. You'll see the dialog box shown below, listing all memos containing instances of the text you entered.

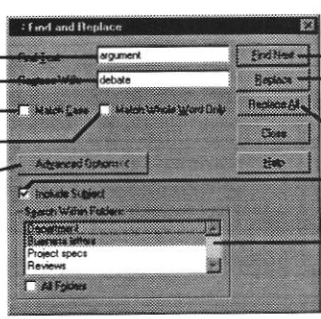


Click to go to the next instance of the found text in any of the memos.

Replacing text

To find and replace text

Choose Edit | Replace to open the dialog box shown here.



Type the text you want to replace and the replacement text.

Check box to match capitalization.

Check box to find whole words only.

Click to see lower panel of Advanced Options (shown).

Click Find Next to go to the next instance...

then click Replace to replace it, or Find Next to skip it and continue search.

Click Replace All to automatically replace all instances.

Check box to include subject in search.

Select folders to search or check All Folders.

Counting words

When you need a count of the words in a memo, let TrueSync Information Manager do the work.

To count words in the current memo

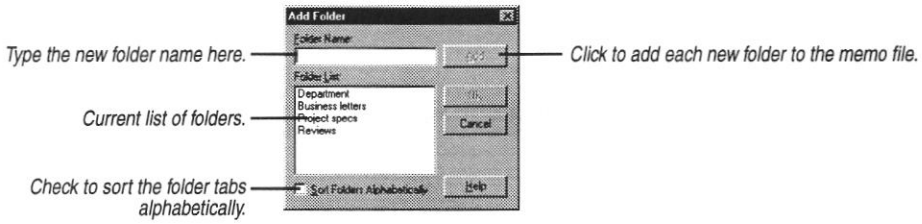
Choose Tools | Word Count. The Word Count dialog box appears with the totals for your memo.

Working with folders

To create one or more new folders

1 Choose Memos | Folder | Add. The New Folder dialog box appears.

2 Enter a name for the folder (up to 24 characters). Choose Add and click OK.



To delete one or more folders

1 Choose Memo | Folder | Delete.

2 Select the folder from the list and choose Delete.

WARNING All memos contained in the folder will be deleted. Be sure to save any memos you want to keep.

3 Click Yes and then click OK.

To change a folder's name

1 Choose Memos | Folder | Modify or right-click the folder tab. The Edit Folder Name dialog box appears.

2 Select the folder from the list, make any change to its name, choose Modify, and then click OK.

To go to a folder without clicking its tab

1 Choose Edit | Go To Folder.

2 Choose the folder from the list and click Go To.

This can be useful when you have a large number of folders.

To reorder the folder tabs

1 Choose Memos | File | Reorder Folders.

2 Select each folder name and choose Up or Down to move the folder in the list.

Working with Memo files

A new memo file initially contains one unnamed folder and no memos.

To create a new Memo file
Choose File | New Memo File.

See also "Extracting memos" on page 79 to create a memo file containing a specific group of records.

To save a Memo file
Choose File | Save Memo File, or click the Save button in the Toolbar.

If you want to save a memo file under a new name, choose File | Save Memo File As and specify the name.

To open an existing memo file
Choose File | Open Memo File and select the memo file.

Working with multiple memos

In addition to editing the information in a memo, you can perform various actions—like deleting—to the memo itself. You can also perform these actions on several memos at once by selecting them.

Selecting memos

To select multiple memos, do either of the following:

- Click a memo's subject line in the memo list, and then press *Shift* and click another memo's subject. The two memos and all memos between them are selected.
- Press *Ctrl* and click several memos' subjects in the memo list. Only those memos you *Ctrl*+click are selected. Once you have selected multiple memos, you can also use *Ctrl*+click to deselect individual memos.

You can perform several functions after selecting multiple memos:

- Deleting (see below)
- Exporting (see "Exporting memos" on page 78)
- Printing (see Chapter 8)
- Moving memos from one folder to another (see "Moving memos between folders" on page 72)

Marking memos

Marking memos gives you another way to specify a group of memos for certain actions, like deleting or printing. It is more lasting than

merely selecting multiple memos, because marked memos remain marked until specifically unmarked. Marked memos are distinguished by a red triangle on the left side of their subject lines.

To mark a memo

Choose Memos | Memo | Mark Current Memo, press *Ctrl+K*, or right-click a memo in the Memos list.

To unmark a memo

Choose Memos | Memo | Unmark Current Memo, press *Ctrl+K*, or right-click it in the Memos list.

To unmark all marked memos

Choose Memos | Memo | Unmark All.

Deleting memos

You can delete a single memo, selected memos, or marked memos.

To delete multiple memos

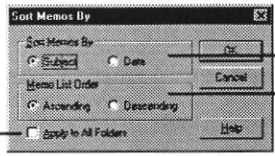
Select them from the Memos list and drag them to the Delete icon on the Deskpad (see "Drag and drop" on page 16). Or choose Memos | Memo | Delete, where you can choose to delete the current memo, selected memos, or marked memos.

Sorting memos

The Memo view contains a listing of memo subjects in the current folder. You can sort memos by subject or date created, in ascending or descending order, for the current folder or all folders.

To sort the memos in the current folder (or all folders at once)

Choose Memos | Memo | Sort. The Sort Memos By dialog box appears.



Select either Subject or Date for the sorting.

Select either Ascending or Descending to order the memos.

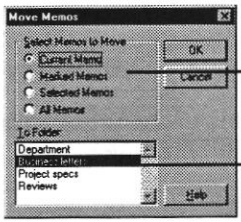
Check Apply To All Folders to sort all memos. Leave unchecked if you want to sort only the memos in the current folder.

Moving memos between folders

To move memos from their current folder to another

You must have more than one memo folder open to activate the Move menu. Drag the memos from the Memos list to the tab of the target

folder. Or you can choose Memos | Memo | Move, which displays the Move Memos dialog box.



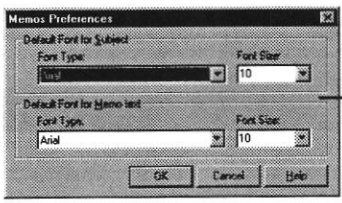
Choose which memos to move.

Select the destination folder.

Setting preferences

To set preferences for the Memos view

Choose Tools | Preferences | Memos.



Select the default font for the memo subject and text.

Changes you make to the subject and memo fonts take effect for memos you create after the font changes.

Quick Letter

TrueSync Information Manager's Quick Letter feature instantly creates a letter from information in the current card, formatted and ready for you to just type in the text. Although Quick Letter operates in Memos view, you can activate it from Contacts and Calendar views as well.

Quick Letter makes use of merge templates that specify where different pieces of information from the card should be placed in the memo. TrueSync Information Manager comes with predefined templates.

You can create or modify merge templates, and you'll need to do so if you want to merge using cards that are not in the standard Business or Personal cardfile formats (see "Creating merge templates").

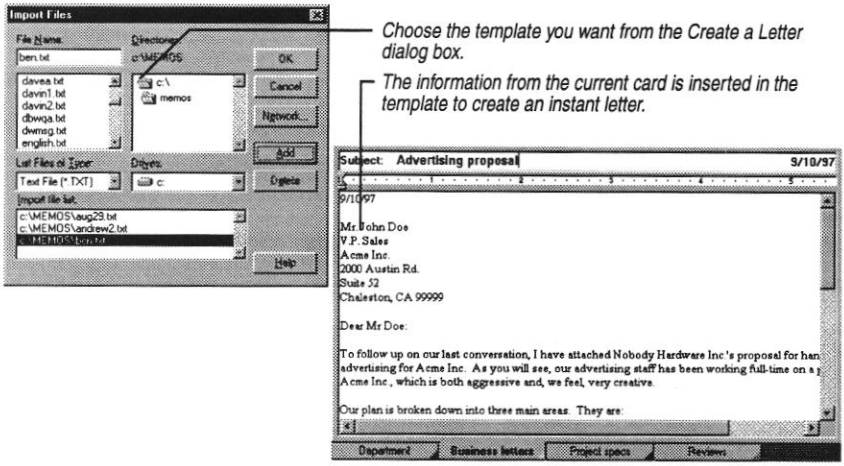
Using Quick Letter

To create a Quick Letter from a template

1 In the Contacts view, click on the index of the card you want to merge with the template.

2 Choose Tools | Quick Letter.

3 From the Create a Letter dialog box, choose the template you want.



Choose the template you want from the Create a Letter dialog box.

The information from the current card is inserted in the template to create an instant letter.

Creating merge templates

A merge template is composed of *constant text* and *fields*. Constant text, like "Dear," or the text of a letter, remains the same on all the merged memos. Fields, like {First Name}, insert different text into the merged memos depending on the information in the cardfile. By combining both of these kinds of text, you end up with, for example, Dear Jennifer on one memo and Dear Patrick on another.

TrueSync Information Manager recognizes the following field codes:

- Field names enclosed in { }, such as {Last Name}. The information is drawn from the current card in the active cardfile.
- Field names with a leading # are replaced with system information. These include {#Username}, {#Company}, {#Date}. (The date format used is set in the Windows 95 Control Panel, Regional Settings. TrueSync Information Manager uses whatever you have selected as the Short Date format.)
- Field names surrounded by # #, such as {#Product#}. You will be prompted to fill these in at merge time. (This option is not available with QuickLetter.)

To create a merge template

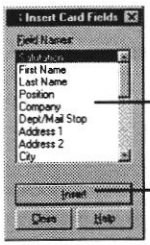
1 From the Memos View, open the file called Templates REX in the Userdata folder. (The full path is usually \Program Files\Starfish\REX TrueSync\Userdata\Templates REX.SKWrite.)

If you have made any changes to the current memo file, save them before creating the new file.

2 Create a new memo and write the constant text, such as the content of a letter.

Be sure to include such unchanging information as your return address at the top. You can apply whatever fonts and formatting you need for an attractive letter.

3 Insert fields from the active Cardfile where appropriate. To insert fields, click your mouse in the memo file where you wish to insert the field. Then choose Memos | Mail Merge | Create Template. The Insert Card Fields dialog box appears.

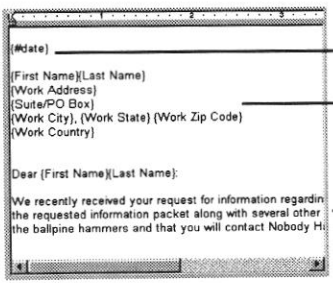


Double-click a field or...

select it and click Insert to insert the field into the merge template.

Inserted fields appear in the merge template between braces, such as {Last Name}.

You also can type field names, including the special types for system information and fill-in information.



Date field

Fields from cardfile

Constant text

4 Save the memo file.

5 If you want to use the template for Quick Letter as well as Mail Merge, use Memos | Memo | Export to save the template in rich text format (.RTF), in the Rex TrueSync\Template folder. Note, however, that Quick Letter does not recognize the manual fill-in field types such as {#Product#}.

You can modify any of the templates provided with TrueSync Information Manager by editing them in the Templates REX.SKWrite memo file. Again if you want to be able to use them with Quick Letter, export the RTF format in the Templates folder. See "Exporting memos" on page 78 for more information.

Personalizing memos

TrueSync Information Manager makes it easy to create custom memos by merging any number of cards from your Cardfile to create personalized letters.

TrueSync Information Manager's mail merge uses templates similar to those used by Quick Letter. Using a template, you can select one or more cards from the Contacts View and merge them with the template to create personalized letters.

Merging cards

When you perform a merge, the field names in the template are replaced with the field information for one or more people in the Cardfile.

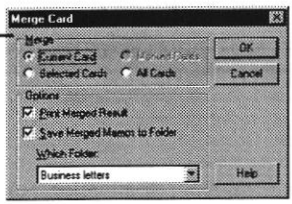
NOTE If there are no merge fields in the selected memo, the contents of the first ten fields on a card are copied into the memo. If a field in the template is not found on the card, the Fill In Information dialog box appears prompting you for text ith which to replace the empty field.

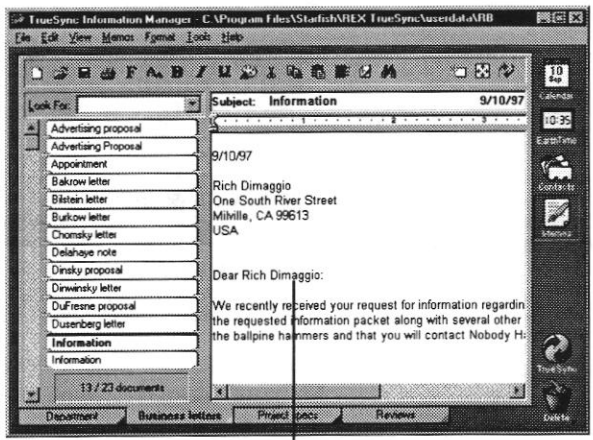
To merge cards with a merge template

Choose Memos | Mail Merge | Cardfile.

1 Choose Memos | Mail Merge | Cardfile.

2 The Merge Card dialog appears. Check Current Card if you want to merge a single card. Check other options you want.





3 The merged letter appears as a new memo, or is automatically printed for you, or both, depending on the options you selected in Step 2 above.

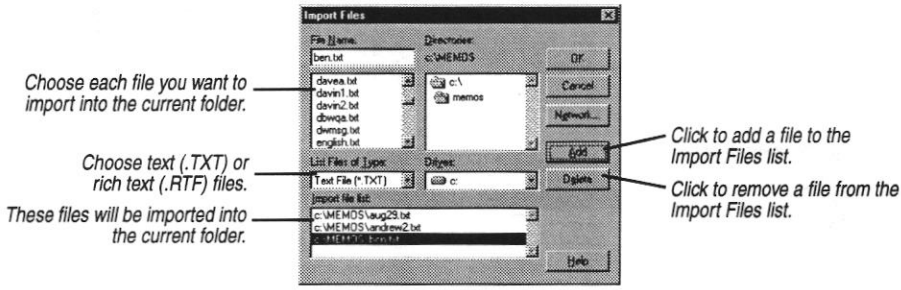
To merge multiple cards, select or mark them before you use the command Memos | Mail Merge | Cardfile to open the Merge Card dialog box and perform the merge.

Importing text and .RTF files

You can import text or rich text format (.RTF) files into a memo, and you can import several files at once. Imported text files are added to the current folder.

To import a text file

From the Memos view, choose Memos | Memo | Import. Then choose the file you want to import in the Import Files dialog box.



You can also cut and paste documents from other applications such as Microsoft Word. TrueSync Information Manager does not support graphics or bit maps.

Opening other file types

TrueSync Information Manager can open files created in other applications.

NOTE TrueSync Information Manager uses the same file format for memo files that Sidekick 97 and Internet Sidekick use for Write Binders.

To open a file created by another application

1. Choose File | Open Memo File.
2. Click the arrow at the Files of Type box and choose the file type from the list.
3. Specify the file location and name.

Exporting memos

The Memos view includes two commands for exporting memos.

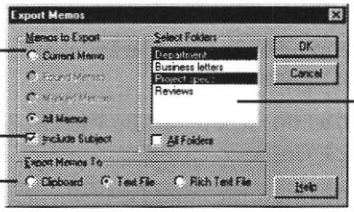
To export the current memo to RTF

Choose Memos | Memo | Export. Specify the name you want for the .RTF file and click Save.

You can also export multiple memos and folders to the Clipboard, to a text file, or to a rich text format (.RTF) file.

To export memos or folders

Choose Memos | File | Export. The Export dialog box appears.



When you've chosen the memos to export, click OK. If you're exporting to a text file, the Save As dialog box appears. Type a name for your new text file and click Save.

Extracting memos

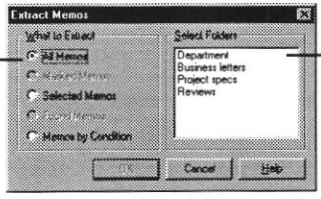
You can use the Extract command to create a new memo file containing a specific group of the records in an existing file. You can select the records yourself, by marking or selecting, or use conditions to specify the records to extract.

To extract memos into a new, unnamed memo file

1 Select, mark, or use Find to locate the memos you want to extract, if appropriate. The options to extract marked memos, selected memos, or found memos are dimmed unless you use one of these methods to select memos before using the Extract command.

2 Choose Memos | Memo | Extract.

3 Specify what to extract, and the folders to extract from. If you extract by condition, another dialog box opens when you click OK where you specify the conditions.



4 Click OK.

TrueSync Information Manager creates a new memo file containing only the memos you have specified.

Combining memos

To add all the memos and folders from another memo file to the open file

1. Choose Memos | Folder | Combine. The Combine Memos dialog box appears.
2. Select the memo file you want to merge with the open file and click Open.

TrueSync Information Manager merges the selected file's folders and memos with the open file's folders and memos. If any folder names are the same, the memos in those folders in the selected file are merged into the correspondingly named files in the open file.

6

The EarthTime view

EarthTime displays a map showing daylight and night time around the world, and shows the current time at eight different cities you select. You can use EarthTime to calculate the difference in time between two locations, and you can configure it to show both your home location and the local time as you travel.

To open EarthTime, click the EarthTime icon in the Deskpad or choose View | EarthTime. The Deskpad icon shows the current time.

Every time you use TrueSync to synchronize your data, your EarthTime settings, such as the Home clock, Local time, and the seven other world clock settings, will automatically be transferred to your REX card.

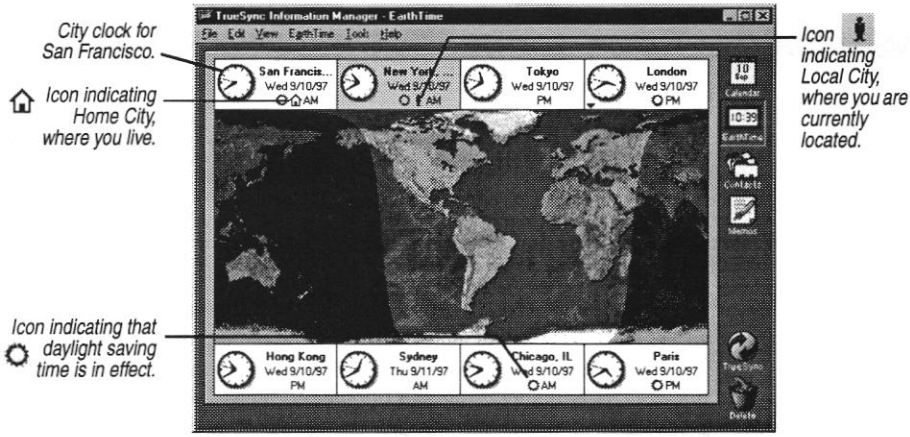
This chapter discusses

- Selecting cities
- Setting and changing the Home Clock and Local Time
- Determining time differences

The EarthTime globe

When you click the EarthTime icon, you see a map of the globe. Light areas are in daylight, and the shading represents nighttime.

The leading edge of the sunlight area, as it moves from east to west, is where sunrise is occurring, and the trailing edge of sunlight is where the sun is setting. The position of the shading is updated automatically every minute. In addition, you can see the light and shadow area move as the seasons change.



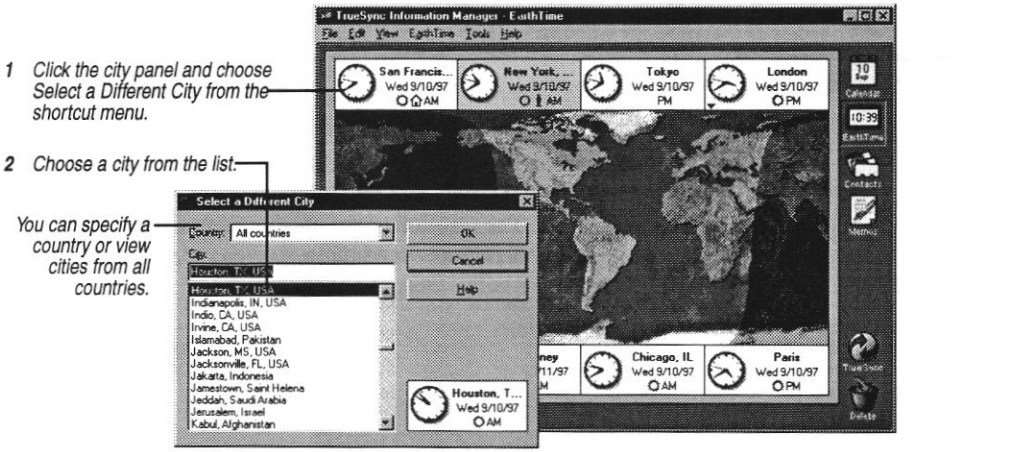
Above and below the map of the globe are the names and local date and time information for eight cities. EarthTime has a database of over 540 cities you can select from in choosing world city clocks to display.

Selecting cities

To change one of the displayed cities

Click the panel containing the city you want to change. Or you can click the city panel, and then choose Edit | Select a Different City.

If you want to display GMT (Greenwich Mean Time) without daylight saving time, select GMT/UTC/Zulu in the city list.



Home Clock and Local Time

EarthTime lets you designate the time where you live as your Home Clock. Most of the time, the Home Clock will match the local time where you are. If you travel with your computer to another time zone, you can set another city as the Local Time.

When you change the Local Time, TrueSync Information Manager adjusts all your events to display correctly in the current local time. For more details, see "Help for travelers: changing time zones" on page 29.

Changing the Local Time

Change the Local Time when you travel with your computer to another location in a different time zone than your Home Clock.

To change the Local Time

1. Set one of the eight city panels to display the local city.
2. Click the panel containing the local city and click Set as Local Time from the shortcut menu.

An icon appears to indicate the Local Time city.

Changing the Home Clock

Your Home Clock should be set automatically when you first start TrueSync Information Manager. Use the following procedure if you need to change it.

To change your Home Clock

1. Set one of the eight city panels to display your home city.
2. Click the panel containing your home city and click Choose As Home Clock from the shortcut menu.

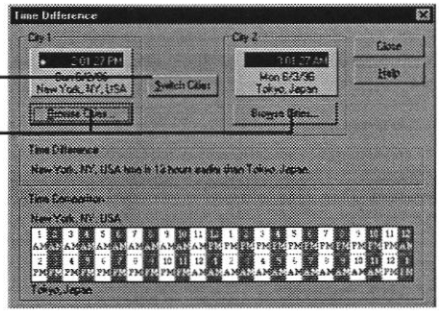
   An icon appears in the Home Clock panel.

Time differences

Time differences between any two locations can be displayed graphically in EarthTime.

To view time differences

Click one of the city panels and choose Time Difference from the shortcut menu.



Click to reverse the cities in the Difference and Comparison displays.

Click to change city.

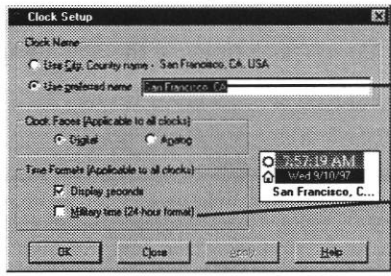
The Time Difference dialog box displays the difference in hours between the Local City and the city that you selected. The comparison at the bottom of the window lets you look up the time of either city in relation to a specific time at the other. You can change the cities by clicking the Browse Cities button in either panel.

Configuring EarthTime clocks

You can configure EarthTime clocks according to your preferences.

To change a clock's options

Click the city panel and choose Clock Setup from the shortcut menu. Choose the options you want to change from the dialog box.



To change the displayed city name, type it here.

Click the appropriate box to show or hide seconds, and to display time in 12-hour or 24-hour format.

Centering a map location

The EarthTime map can be shifted left or right to put your city, or any map location, at the center.

To center one of the eight displayed cities

Click the city panel and choose Make (city) the Map Center.

To center another map location

Point to the map location you want at the map center and right-click. Choose Center Map Here.

7

Synchronizing Your REX Card

As you enter and change your TrueSync Information Manager files, or import files from other PC organizer programs, you will want to synchronize your REX card with the latest information. When you synchronize, files are transferred from your personal computer to your REX card, so they are available for viewing wherever you go.

The synchronization process is divided into three basic procedures.

- **Selecting the synchronization configurations.**

  Before you can synchronize information to the REX card for the first time, you must complete the REX TrueSync Configuration Wizard. The configuration wizard lets you select which files to synchronize and other preferences. Once you have completed the configuration wizard, you do not need to use it again until you want to change your synchronization configurations.

- **Connecting the REX card to a computer.**

  In order to synchronize information, your REX card must be properly connected to a personal computer. You will need either the REX docking station or a Type II PC card (PCMCIA) slot to connect to a computer.

- **Synchronizing information to the REX card.**

  Once the synchronization configurations are selected and your REX card is connected to a computer, you are ready to synchronize. Synchronization is easy. All you do is click the Synchronize button on the TrueSync Synchronization window and the TrueSync synchronization software does the rest.

Synchronization is the process of transferring selected information from TrueSync Information Manager to the REX card. You can easily change which information is synchronized or update the same range of information.

When you synchronize, you'll always have your latest Calendar, Contacts, Memos, and To Do information with you, wherever you go.

What synchronization does for you

- Keeps your REX card updated by synchronizing data with one-click ease.
- Seamlessly transfers data between your computer and your REX card.
- Avoids the need to re-key information — you can enter it all in your computer, and then update your REX card whenever you want, just by clicking a button.
- Gets you up and running quickly, and you can customize to suit your own working style.

Use the REX card TrueSync Configuration Wizard to select the information you want to send from the TrueSync Information Manager to your REX card card. You can send Calendar, Contacts, Memos, and To Do information, and specify preferences settings and personal identification details.

Depending on the amount of data you have, you may synchronize all of these, or you may choose to transfer only specific information. For example, if you are going on a business trip, you could synchronize the calendar date range of the duration of your trip. Then you could select travel and business cardfiles, along with a memo file of information related to the trip.

Selecting the synchronization configurations

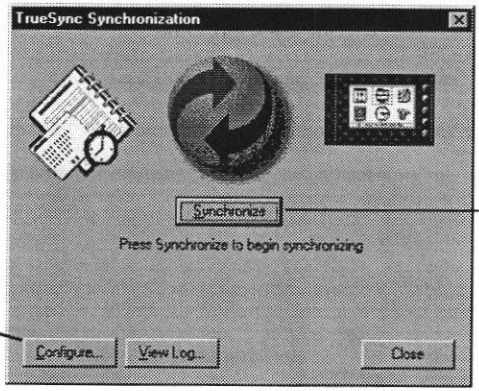
The REX TrueSync Configuration Wizard lets you select which files to synchronize, which cardfile fields to map, how the REX card is connected to your computer, and other preferences.

NOTE Before synchronizing your REX card for the first time, you must complete the REX TrueSync Configuration Wizard. After that, use the configuration wizard to change the synchronization configurations.

To start the REX TrueSync Configuration Wizard

1 Choose Tools | Synchronize | TrueSync. Or click the TrueSync icon on the Deskpad.

If you have any unsaved files, you will be prompted to save them before launching TrueSync. Only saved files can be synchronized to a REX card. If you do not save your files before synchronizing, information that currently appears in TrueSync Information Manager may not appear on your REX card.



Click to synchronize

Click to start the REX TrueSync Configuration Wizard.

2 Click the Configure button to begin.

3 Complete the configuration wizard by following the steps listed in the subsequent sections of this chapter.

4 At the final configuration wizard window, click the Finish button.

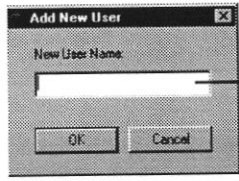
You can change the synchronization configurations by clicking the Configure button on the TrueSync Synchronization window, selecting a user name, and then changing your configurations.

Selecting a user name

TrueSync Information Manager allows more than one person to synchronize REX from a single installed version of the program. However, each user must create a unique user name with its own set of synchronization configurations. Before you can change synchronization configurations, you must select a user name.

To create a new user name

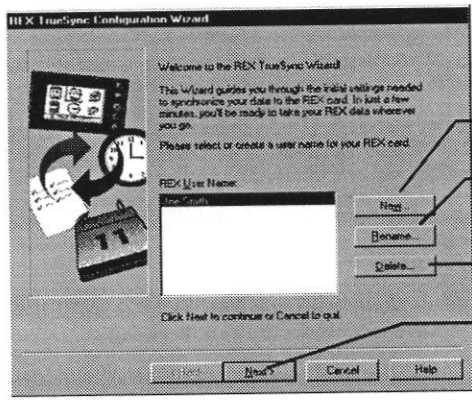
If no user names have been created, you must create one before selecting synchronization configurations.



Type a new user name.

To select an existing user name

Once a user name has been created, the following window appears.



Click here to create a new user name.

Highlight a name and then click here to change it.

Highlight a name and then click here to delete it.

When finished, click to go to the next configuration wizard window.

1 Select one of these options:

- Click the New button and type a new user name.
- Click an existing user name to highlight it.
- Click the Rename button to change a highlighted user name.
- Click the Delete button to delete a highlighted user name.

2 Click the Next button to go to the next configuration wizard window.

Using multiple user names

TIP

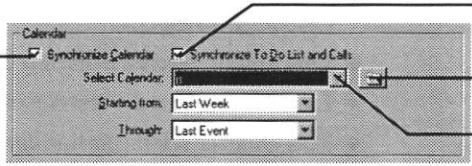
You can avoid having to erase a REX card before synchronizing it with a new user name by changing the synchronization configurations of an existing user name instead.

If you plan to use multiple user names with a single REX card, you must erase all the information from that REX card before synchronizing it with a different user name. This is due to the fact that TrueSync associates a single user name with each synchronized REX card. TrueSync will not allow you to synchronize a REX card with another user name when that REX card contains downloaded information.

To erase the information in a REX card, carefully remove its batteries and then wait a few minutes before replacing them. To learn how to remove the batteries, read the *REX User's Guide*.

Selecting the Calendar

After you have selected a user name, you can select the Calendar synchronization configurations. You can select which calendar to synchronize, as well as whether to synchronize To Do items and Calls.



When checked, synchronizes the Calendar.

When checked, synchronizes To Do items and Calls.

Click to change the Calendar folder.

Click to select the Calendar file to be synchronized.

NOTE If Synchronize Calendar or Synchronize To Do List and Calls is not checked, any calendar information, To Do items, or Calls stored in your REX card will be deleted when it is synchronized. The fies on your PC will remain intact.

1. To synchronize calendar information, make sure that Synchronize Calendar is checked.
2. To synchronize a To Do list and Calls, make sure that Synchronize To Do List and Calls is checked.

   You can synchronize a To Do list and Calls without synchronizing a calendar. But if you do, you must still select the calendar file where the To Do list and Calls are saved on your computer.
3. If needed, click the folder icon to select another calendar folder.

   The default folder is "REX TrueSync/userdata."
4. Click the Select Calendar drop-down list and select one of the calendar files from the list.

5 Change the Starting from and Through date lists to set a date range to be synchronized.

If a specific date range is selected, calendar information outside that range will not be transferred to your REX card. The "Starting from" date sets the first day that calendar entries will appear on your REX card.

- **Last Year** selects January 1st of the previous year as your start date.
- **This Year** selects January 1st of the current year.
- **Last 6 Months** selects six months ago today. (For example, if today is August 10, this option would make February 10 the start date.)
- **Last Quarter** selects the first day in the last quarter. (The quarters are January-March, April-June, July-September, and October-December.)
- **Last Month** selects the first day of last month.
- **Last Week** selects the first day of last week.
- **This Quarter** selects the first day in the current quarter.
- **This Month** selects the first day of the current month.
- **This Week** selects the first day of the current week (i.e., Sunday).
- **Today** selects today.
- **First Event** selects the day where you have your first entry.

The "Through" date sets the last day that calendar entries will appear on your REX card.

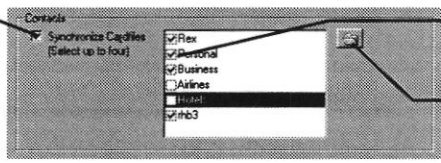
- **Tomorrow** selects tomorrow as your end date.
- **This Week** selects the last day of this week.
- **Next Week** selects the last day of next week.
- **This Month** selects the last day of this month.
- **Next Month** selects the last day of next month.
- **This Quarter** selects the last day of the current quarter.
- **Next Quarter** selects the last day of next quarter.
- **This Year** selects December 31st of the current year.
- **Next Year** selects December 31st of the following year.

- **Last Event** selects the day where you have your last entry.

NOTE To synchronize the entire Calendar, select First Event as the "Starting from" date and Last Event as the "Through" date.

Selecting Contacts

You can select up to four cardfiles (i.e., contacts or address files) to be synchronized to your REX card.



1 To synchronize cardfiles, make sure that Synchronize Cardfiles is checked.

NOTE If Synchronize Cardfiles is not checked, all contacts stored in your REX card will be deleted when it is synchronized.

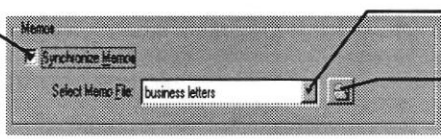
2 If needed, click the folder icon to select another folder containing cardfiles.

The default folder is "REX TrueSync/userdata."

3 Click to select up to four cardfiles.

Selecting Memos

You can synchronize one memo file between a REX card and TrueSync Information Manager. This memo file can contain as many folders and memos as can fit on the REX card.



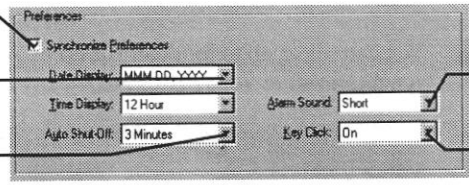
1 To synchronize memos, make sure that Synchronize Memos is checked.

NOTE If Synchronize Memos is not checked, all the memos stored in your REX card will be deleted when it is synchronized.

2 If needed, click the folder icon to select another folder containing memo files. Click the drop-down list and select a memo file.

Selecting Preferences

You can also select preferences, such as the date and time display and automatic shut-off time, for your REX card.



When checked, synchronizes preferences.

Click to change the date display.

Click to change the automatic shut-off time.

Click to change the time display.

Click to change the alarm sound.

Click to turn the key clicks on or off.

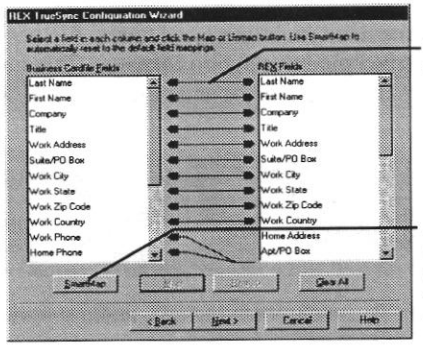
NOTE If Synchronize Preferences is not checked, the preferences for your REX card will revert to the default preferences when it is synchronized.

1 To synchronize preferences, make sure that Synchronize Preferences is checked.

2 To change preferences, click the drop-down lists and select the new settings.

Mapping cardfile fields

Before your cardfiles can be synchronized, their field names must be mapped. When cardfile field names are mapped, the information in a field from a PC file is transferred to the corresponding field in a REX card.



The two-side arrows indicate cardfile fields that are mapped.

SmartMap automatically maps each cardfile field to be synchronized. If you change the mappings and then want to restore the default mappings, click the SmartMap button.

NOTE The cardfiles in the REX card have 26 pre-named fields, which cannot be renamed or moved.

Read the following instructions to learn how to unmap and map cardfile fields. When you are done mapping, or if you do not want to change the mappings, click the Next button.

To unmap fields individually

Click to highlight a mapped field in each column and then click the Unmap button.

To map fields individually

Click to highlight an unmapped field in each column and then click the Map button. Or highlight an unmapped field in the left column and then double-click a field in the right column.

To map multiple cardfile fields to a single REX field

1 Click to highlight a field in the left column.

2 Click to highlight a mapped field in the right column.

3 Click the Map button.

To unmap all the fields

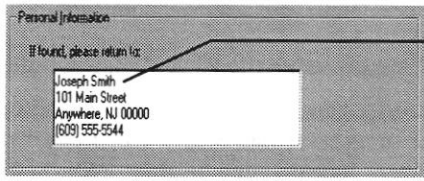
Click the Clear All button.

To restore the default mappings

Click the SmartMap button.

Entering personal identification information

The final window of the configuration wizard lets you enter personal identification information that will appear on your REX card. This information could be useful if you lose your REX card.

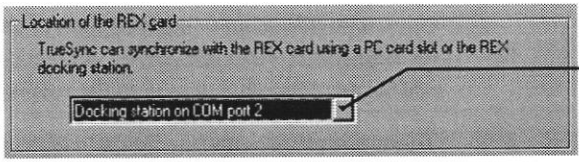


Type your name, address, and phone number, pressing ENTER to go to the next line.

NOTE If no personal identification information is entered in the configuration wizard, any personal identification information stored in your REX card will be deleted when it is synchronized.

Selecting the location of the REX card

The final window of the configuration wizard also asks you to select the location of the REX card (i.e., how and where it is connected to your computer). You can select either a serial communications (COM) port or a PC Card slot.



Click to change the location of the REX card connection.

CAUTION If the wrong location is selected, you will not be able to synchronize information to a REX card.

To select the location of the REX card

1. Click the drop-down list.
2. If you are using the REX Docking Station to connect, select a COM port. Make sure it is the same COM port to which the docking station actually is or will be connected.
3. If you are using a PC Card slot to connect, select PC Card slot.
4. Click Finish to return to the TrueSync Synchronization window.

Before you synchronize, make sure that the REX card is properly connected to your personal computer.

If you are using the REX docking station

With its screen facing you, slide the REX card into the card slot until the connection tone sounds and "Ready" appears on the REX card screen. To learn more, read the *REX Docking Station User's Guide*.

If you are using a PC card slot

Slide the REX card into an open Type II PC Card (PCMCIA) slot until a connection tone sounds or a PC Card icon appears on the Windows Taskbar. For more information, read the *REX PC Companion User's Guide* or your computer manual.

NOTE If your computer uses Windows NT 4.0 as its operating system, you must use the REX docking station to connect the REX card to one of the serial communication ports on the computer.

Synchronizing information to the REX card

When the synchronization configurations are selected and the REX card is connected to a computer, you are ready to synchronize information to the REX card.

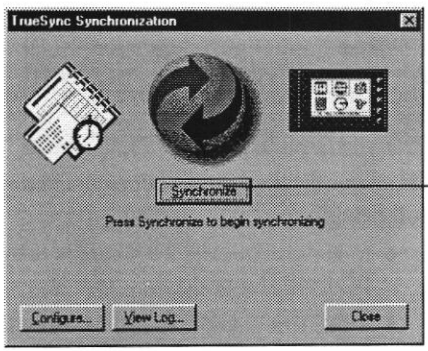
To synchronize files from another PC organizer program using the TrueSync synchronization software built into TrueSync Information Manager, you must first import those files into TrueSync Information Manager. To learn how to import files, read the appropriate chapters (e.g., "The Calendar View") in this user's guide.

CAUTION When you synchronize a REX card, all the information previously stored in it is erased and replaced with the files and preferences currently selected on the REX TrueSync Configuration Wizard.

NOTE If multiple user names have been created in the REX TrueSync Configuration Wizard, the most recently configured user name will be used for synchronization. If you want to select another user name for a previously synchronized REX card, you must first erase that REX card. To learn how, read "Using multiple user names" on page 91.

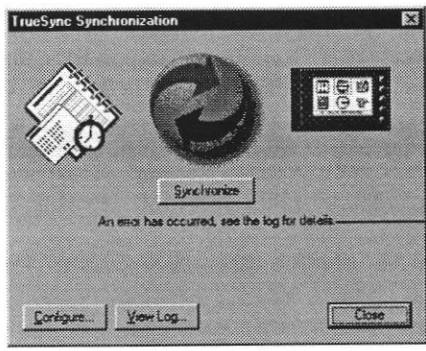
To synchronize your REX card

1. If the TrueSync Synchronization window is not on your computer screen, do one of the following:
   - Choose Tools | Synchronize | TrueSync from the TrueSync Information Manager menus.
   - Or click the TrueSync icon on the lower right of the Deskpad.
2. At the TrueSync Synchronization window, click the Synchronize button.



Click to start Synchronizing

A status message appears in the TrueSync Synchronization window telling you if your synchronization was successful or not. If your synchronization was not successful, view the log file to see details of the error. (See *Viewing the log file*, below.)



Error Message

The synchronization time depends on the size and number of the files.

CAUTION Do not disconnect the REX card from your personal computer while files are being synchronized.

If your REX card is protected with a password, click the key buttons in the Enter Password window to enter your five-button password and then click OK.

Click the key buttons to enter the five-button password and then click OK.

If synchronization does not begin and a warning appears, check the following:

- Make sure that the REX card is fully and properly inserted into a PC Card slot or docking station.
- Make sure that the REX card is connected to your computer in a location (i.e., using a PC Card slot or the docking station) that

matches the selection in the configuration wizard. To learn more, read "Selecting the location of the REX card" on page 96

- If you are using the docking station, make sure that the serial cable is properly connected to an available serial communications (COM) port on your computer.

NOTE If you try to synchronize more information than your REX card can store, no files will properly synchronize. In that case, use the REX TrueSync Configuration Wizard to select fewer and smaller files for synchronization.

Once synchronization is complete, click OK.

Press the eject button on either the docking station or the PC Card slot on your computer to remove the REX card.

Viewing the log file

The REX TrueSync log file records information about the most recent synchronization for each user name. This information includes the time and date of the synchronization, the files that were synchronized, and any errors or unexpected events that occurred during synchronization.

To view the log file

1. Click the View Log button in the TrueSync Synchronization window. Or, right-click the TrueSync icon on the Windows Taskbar, and then select View log.
2. If needed, select a user name from the drop-down list.
3. To delete the messages for the current user, click the Clear button.
4. Click OK to exit the window.

Launching TrueSync from the Taskbar

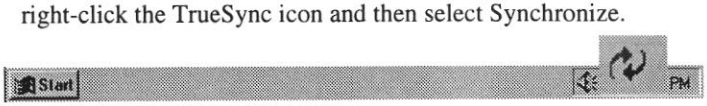
TIP

You can also right-click the TrueSync icon on the Windows Taskbar and select Configure or View Log to open the REX TrueSync Configuration Wizard or view the output log.

You can open the TrueSync Synchronization window without starting TrueSync Information Manager by using the TrueSync icon on the Windows Taskbar. If at least one user name has been configured in the REX TrueSync Configuration Wizard, you can then synchronize your REX card with a single click.

To launch TrueSync from the Taskbar

1. On the Windows Taskbar, double-click the TrueSync icon. Or, right-click the TrueSync icon and then select Synchronize.



2 Click the Synchronize button to begin synchronization.

NOTE If you have more than one user name for a single REX card, you must erase the REX card before you can synchronize it using a different user name. To learn more, read "Selecting a user name" on page 89.

8

Printing

TrueSync Information Manager lets you print from the Contacts, Calendar, or Memos views to a variety of formats, using preprinted forms or your own custom ones. You can print your generated reports, and you can preview your output before you print it.

You can print the information in the Contacts view as cards, described in the following section, or as labels, address books, or envelopes using special formats.

You can easily print index cards to preprinted index card forms using the Print Labels command. See "Printing labels, address books, and envelopes."

This chapter discusses

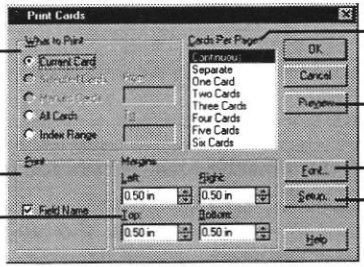
- Printing cards
- Printing labels, address books, and envelopes
- Printing calendars
- Printing Memos

NOTE If you have multiple printers, you can select the printer you want using the File | Print Setup or File | Page Setup command.

Printing cards

To print the cards

In the Contacts view, choose File | Print | Cards. The Print Cards dialog box appears.



Specify which cards to print.

Select parts of the card to print.

Enter margin settings as needed to position the cards on your paper.

Select the number of cards to print on each page.

Click to preview your output onscreen before you print.

Select the fonts used in printing.

Printer setup options.

The Cards Per Page setting

As you specify more cards per page, the cards themselves become smaller. If a card becomes too small to contain all its fields, TrueSync Information Manager drops the extra fields from the bottom of the card. If you specify one card per page, TrueSync Information Manager will drop fields as needed to make the card fit. If you choose Separate, each card will begin on a new page, but will not be restricted to fit on one page.

Select Continuous to print the cards one after another, without page breaks between cards.

Printing labels, address books, and envelopes

TrueSync Information Manager can print to almost any size label, address book page, or envelope. The dialog boxes for printing these forms include numbered steps to help you organize and print the information the way you need it. In addition, you can view special Hints screens that provide details on arranging the contents.

Templates let you print in a variety of popular label, index card, and address book formats. You can modify these or create your own templates.

To print cardfile information to labels, address books, or envelopes

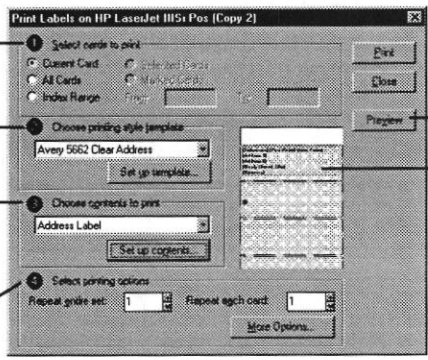
Choose File | Print, and select Labels, Address Book, or Envelopes. The corresponding dialog box appears; the Print Labels dialog box is shown in the example below.

Follow the numbered steps in the dialog box. Step 1 prompts you to specify the cards to print.

In Step 2, you determine placement of labels on the page. Click Set up to create or modify a template.

In Step 3, you specify what text, fields, or pictures to print. Choose previously created contents, or click Set up to define/modify contents.

In Step 4, you specify the number of copies and other options. See text for details.



Click to preview the results of your choices.

You can see the overall layout here as you work.

The numbered steps are designed to help you specify what to print and arrange it within the print area available. The procedures for using all three dialog boxes are the same, but involve different templates and content arrangements. These numbered steps are discussed in more detail below.

Once you have specified the information in the four steps, click Preview to see the result. Click Print when you're ready to print.

Step One: Select cards to print

This panel is where you specify the range of cards to print. If you mark or select cards before you begin printing, you can check Selected Cards or Marked cards for printing. Check Current Card to print only the currently displayed card.

Step Two: Choose a printing style template

The template is the format of your printed output, whether that's a label of a specific size and arrangement on a sheet, an address book page format, or a specific envelope.

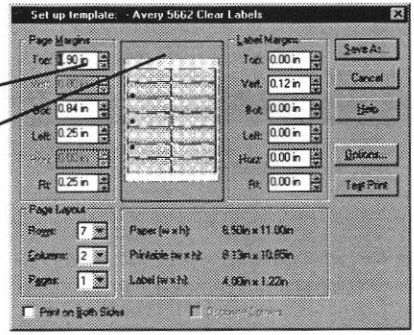
NOTE If you choose a template from the template list, you may need to adjust the margin settings to fit your printer's printing area. See your printer's manual for specific dimensions.

In most cases, you can simply click the down-arrow in the text window and choose a template from the list.

In addition, you can easily create a new template or modify an existing one.

To create or modify a template

1 In Step 2 of the Print dialog box (see page 103), click the Set up template button to open the dialog box shown below.



As you pass the cursor over the dimensions... arrows show you where they apply.

2 Set the number of rows, columns, and pages to print per sheet of paper in the Page Layout group.

- **Rows.** The number of rows of labels on the sheet to which you are printing. Up to 60 rows are possible, depending on the size and margins specified.
- **Columns.** The number of columns of labels on the sheet to which you are printing. Up to four columns are possible, depending on the size and margins specified.
- **Pages.** The number of address book pages on each sheet of paper. Up to four pages are possible, depending on the size of the address book used. Each page has its own Index Tab, Page Number, and several address book entries. This setting does not apply to labels.

3 Change the page margins if necessary.

NOTE Page margins are needed only for address books, which can print to multiple pages on the same sheet.

4 Change the label margins settings if necessary.

Some margins might need to be set to the second decimal value for accuracy in printing to a specific label. The dimensions for the

label size immediately reflect the change as you adjust the label margin settings.

5 When the Print On Both Sides option is checked, the Options button becomes available. Clicking Options displays the Template Setup Options dialog box, where you can set several reverse-side printing options and specify the position of binder holes.

6 The Opposite Corners setting allows alignment of the binder holes to be adjusted by changing top and bottom margins.

7 When done, click Save As. To modify the existing template, save your changes under the original name. To create a new template, type a new name and click OK.

8 Click Test Print to see a printed example of the effect of your changes.

Since template definitions are saved with each cardfile, the changes you make only apply to the current cardfile's templates.

Template settings may be different for different printers. Experiment with your printer to find the best results.

TIP

If you extract a card from a cardfile, you create a new cardfile that includes the templates of the first cardfile.

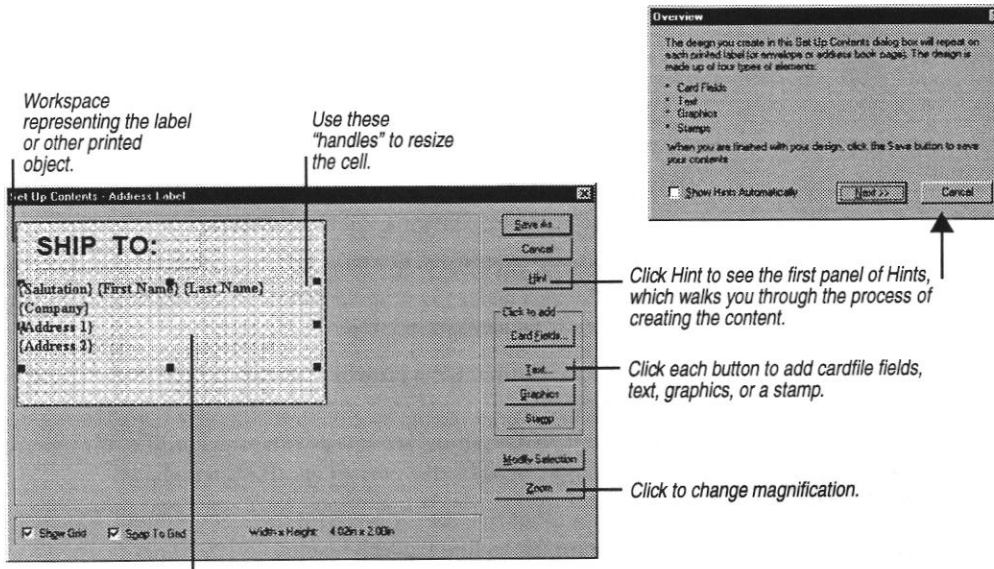
Step Three: Choose contents to print

Here you specify just what appears in the printed result, including text, Cardfile fields, and graphics. If you have predefined contents, you can click the down-arrow and choose from the list.

To set up the contents

1 Click the Set Up Contents button in the Print dialog box.

2 The panel that appears contains a green shaded workspace representing one label (or envelope, or address book page) for creating the contents. For an element to print in a label, you must position it within this shaded area (not within the background rectangle). Any elements you add to this contents design repeat on each label you print.



Different fonts are used in the two cells in this example. One cell contains "Ship To" in a large font, and the other contains the name and address fields in a smaller font.

3 Each element, such as a group of fields or a graphic image, is contained in a "cell" that can be sized and moved within the workspace. In the figure above, the cell containing address information occupies the entire label area.

When you click a cell, black squares, called "handles," appear in each corner that you can drag to resize it. To move the cell, drag it to the location you want.

To change font, alignment, and colors, or to edit the contents of the cell, right-click it. Font, alignment and color attributes are unique to each cell, allowing you to have several different styles in different cells on the same label.

4 When done, click Save As to save your changes. Type a new name if you want to create a new contents design.

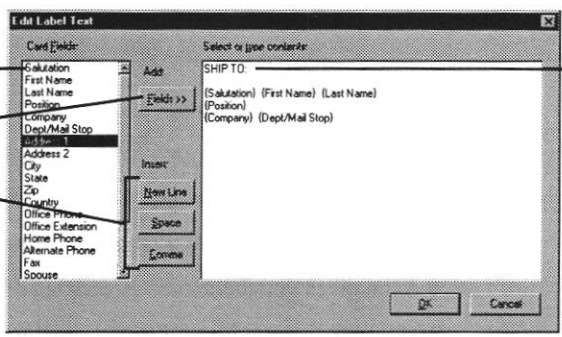
Since contents design definitions are saved with each cardfile, the changes you make only apply to this cardfile's contents designs.

The content can consist of the following types of text:

- Card field text (like a person's name or address, that prints a different card's information on each new label)
- Unchanging text (like the word "Greetings!" or "Ship To:" that prints on each label, or your return address for an envelope)

Card fields

The Card Fields button lets you insert fields from the cardfile into the cell. The fields will be filled in with data from the card or cards you select.



Double-click each field to add it, or...

click a field and click Fields >>.

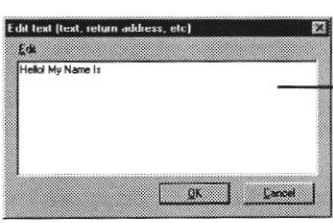
Be sure to type a space or punctuation where needed, or use these buttons.

You can include unchanging text with the cardfile fields by typing directly in this space.

This dialog box makes it convenient to insert fields in label, although you can type the field names yourself, either here or in the Text dialog box discussed next.

Text elements

Use the Text button when you have a lot of unchanging text that prints on every item, such as your return address on an envelope.



Type your text here.

TIP

You can add multiple text elements with unique fonts, colors, and alignment.

Type whatever text you want the text cell to contain. Any text you type is repeated on each label.

When you're finished, click OK. A new cell appears. By right-clicking the cell you can change the font, color, and alignment, change the text and delete the element.

Stamp elements

A number of ready-made phrases such as "1st Class," "Urgent," and "Confidential" are available as *stamps*. Click the Stamp button, select the phrase you want, and a new text cell containing that text appears. By right-clicking a Stamp cell you can change its message and font, rotate it, or delete it.

Graphic elements

Clicking the Graphic button displays four choices:

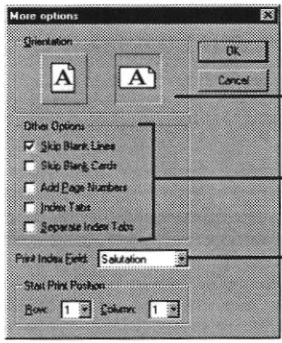
- **Bitmap** lets you choose a .BMP file to import.
- **Frame** creates a rectangle.
- **Round Frame** creates a rectangle with rounded corners.
- **Line** gives you the choice of creating a horizontal or vertical line.

Right-click the graphic cell to see a menu of its properties you can change.

Step Four: Select printing options

The options let you specify quantity to print and other settings. Two repeat options are available: Repeat Entire Set prints the entire set once and then starts over, for the number of times you specify. Repeat Each Card prints each card for the number of times specified before going on to print the next card.

The additional choices available with the More Options button are shown in the following figure.



Choose Portrait (vertical) or Landscape (horizontal) page orientation.

Check boxes for printing options you want.

Select the field used to determine the printing order. For example, to print cards in Last Name order, choose the Last Name field here.

For envelope printing, the More Options button lets you select the feed and orientation of envelopes in your printer, plus options for skipping blanks and setting margins.

Calendar printing

You can print events, calls, and tasks from your calendar in a variety of formats. TrueSync Information Manager can print the daily, weekly, monthly, and yearly calendars in its own format using preprinted or standard paper.

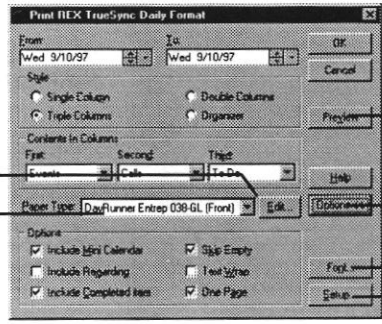
In addition, TrueSync Information Manager can print to the paper forms of several popular organizers:

- At-A-Glance daily, weekly, and monthly forms
- Day-Timer daily organizer forms
- Franklin-Covey Planner daily organizer forms
- Day Runner dated or undated daily, weekly, and monthly forms
- Filofax weekly and monthly formats

Printing in the daily format

Using the TrueSync Information Manager format, you can print on any size paper or personal organizer. You can use special preprinted paper or you can create your own organizer using standard blank paper.

1 Choose File | Print | REX TrueSync Daily Format from the Daily view of the Calendar. The Print TrueSync Information Manager Format dialog box appears.



Click to preview the printed pages.

Click to change margins.

Choose the type of paper you're printing to.

Click to display the options below.

Click to change the fonts used in the calendar.

Click to change your Windows print settings.

2 Change the dates in the From and To boxes if you want to print a series of days. The default date is whatever day you had selected in the Calendar.

3 In the Style group, choose the number of columns per page that you want to print.

4 Choose the type of activity you want to appear in each column from the drop-down lists in the Contents In Columns group. If you pick the same activity for more than one column, text flows continuously from the bottom of one column to the top of the next.

5 Select the paper type that corresponds to the paper you're printing to. TrueSync Information Manager can print to a number of popular laser forms by Day Runner, Day-Timer, and Franklin-Covey. If you need to change any of the settings, click the Edit button. The Paper Setup dialog box appears.

Edit, add, or delete paper types in this dialog box. You can print the TrueSync Information Manager format to almost any size of blank organizer paper by adjusting the margins accordingly. When you're done, click Change, and then click Close to return to the Print TrueSync Information Manager Format dialog box.

6 Click the Options button to expand the dialog box and choose from the following options for your printout.

- **Include Mini-Calendar.** Prints current month calendar at the top of the page. The previous and next month calendar grids are also printed, when space allows.

- **Include Regarding.** Prints any Regarding notes attached to activities.
- **Include Completed Items.** Prints all entries from the selected lists, including those checked-off as completed.
- **Skip Empty.** Prints only those lines from the Appointments, Calls, To Do, or Goals list containing data; all blank lines between entries are omitted.
- **Text Wrap.** Prints the entire description of an activity (up to 500 characters). If necessary, the text wraps to additional lines.
- **One Page.** Truncates the schedule and prints only what can fit on a single page. Changing the start and end times or time increments for the Appointments list on the daily schedule or choosing Skip Empty can help shorten the printed material.

NOTE Be prepared to experiment with the settings to achieve the results you need for your paper type and printer.

7 If you want, you can change the print fonts for the calendar by clicking the Font button, available when the Options button is clicked. You can choose a different font for each part of the calendar.

8 Choose OK to print the calendar.

The activities print just as they appear in the Daily view of the calendar. Their descriptions, time increments, durations of appointments, alarms, and other displayed information are all printed.

Printing in the different formats

In addition to the Daily view formats, TrueSync Information Manager can print in several different calendar formats, including one-, two-, and six-week, monthly and yearly calendars.

When printing in weekly, monthly, and yearly formats, the information printed is determined by the display setup for that view. Choose Tools | Preferences | Calendar, and then choose the Weekly, Monthly, or Yearly Setup tabs to customize the printed information.

1 Switch to the glance view (Weekly, Monthly, or Yearly) that you want to print.

2 Choose File | Print and select the format you want.

3 Choose the date range you want to print. The default is the date range currently displayed in that view.

4 Set any other options you want to print, including a title, footnote, mini-calendar, today's date, or graphic images. (If you want to add graphic images, they must be black-and-white .PCX files; store them in the TrueSync Information Manager Data folder).

5 Change the fonts for the calendar by clicking the Fonts button. You can choose a different font for each part of the calendar.

6 Choose Setup to change the orientation or the page size for the printer. Adjust the margin settings as necessary.

7 Choose OK to print the calendar.

At-A-Glance forms

TrueSync Information Manager can print directly to pages in At-A-Glance organizer format (in Portrait orientation only). The pages from the notebook must be fed through the printer.

1 Choose the Calendar view: Daily, Weekly, or Monthly.

2 Choose File | Print and then At-A-Glance format from the menu.

3 Select one of the At-A-Glance formats from the Format list in the Print dialog box.

4 Experiment with the Origin settings if the printed text doesn't match the lines on the page. (You can print a test draft on a blank sheet of paper and compare the output to the At-A-Glance sheet to make sure that the text and lines match.)

5 For Daily view, check the Start On button to specify Left page or Right page. For Weekly or Monthly views, specify the paper you are printing on—dated or non-dated.

6 If you want, you can change the font by clicking the Font button. A point size of 8 or 9 works best with the available space.

7 Choose the range of dates to print, and choose OK.

Day-Timer and Franklin-Covey forms

TrueSync Information Manager can print directly to pages from the Day-Timer and Franklin-Covey Planner personal organizer notebooks. The pages from the notebook must be fed through the printer.

1 From the Daily view of the Calendar, choose File | Print and then Day-Timer Daily Format or Franklin-Covey Daily Format from the cascading menu.

2 Select a Day-Timer or Franklin-Covey format from those listed in the Print dialog box.

3 Experiment with the margin settings if the printed text doesn't match the lines on the page. (You can print a test draft on a blank sheet of paper and compare the output to the Day-Timer or Franklin-Covey sheet to make sure that the text and lines match.)

4 If you want, you can change the font by clicking the Font button. A point size of 8 or 9 works best with the available space.

5 Choose the range of days to print, and choose OK.

TrueSync Information Manager prints on the forms as though they are being center-fed into the printer. If your printer does not feed smaller (less than 8.5 x 11) sizes of paper centered, adjust the margin settings to accommodate your printer. You can use negative numbers in the margin settings, if necessary.

Day Runner and Filofax forms

TrueSync Information Manager can print directly to pages from the Day Runner and Filofax personal organizer notebooks. Both dated and undated versions of a variety of Day Runner forms can be used. The pages from the notebook must be fed through the printer

1 Switch to the view that you want to print, and choose File | Print. Choose Day Runner Format or Filofax Format. The Print Day Runner or Print Filofax dialog box appears.

2 Select a format from the Format list, and choose Dated or Non-dated for Day Runner, depending on the paper you're printing to.

3 Adjust the page origin settings if the printed text doesn't match the lines on the page. (You can print a test draft to a blank sheet of paper and compare the output to the Day Runner or Filofax sheet to make sure that the text and lines match.)

4 Change the fonts for the calendar by clicking the Fonts button. You can choose a different font for each part of the form.

5 Choose the date range you want to print. The default is the range currently displayed in that view.

6 When ready, choose OK to print the calendar.

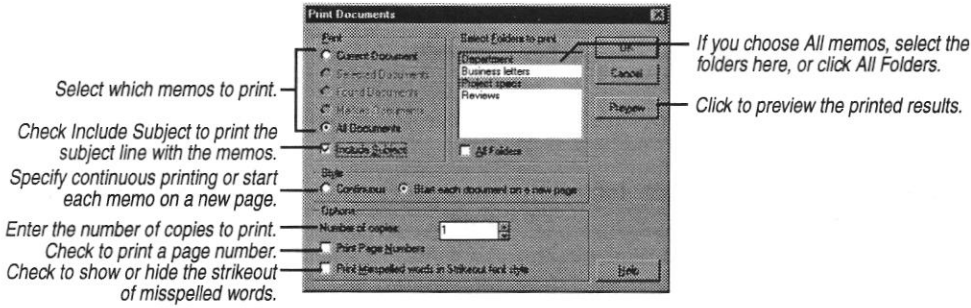
When printing to weekly and monthly forms, the information printed is determined by the display setup for that view. Choose Tools | Preferences and click the Calendar button to set up the Weekly or Monthly views.

Printing in the Memos view

You can print a single memo, all of the memos filed in specific folders, selected memos, marked memos, or found memos listed in the Found window.

To print your memos

Choose File | Print from the Memos view, or click the Print button on the Memos Toolbar. The Print Memos dialog box appears.



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